EHM Demographics (V8.0)

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Summary:	This manual will take you through EHM Demographic

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Confidentiality / Document Control

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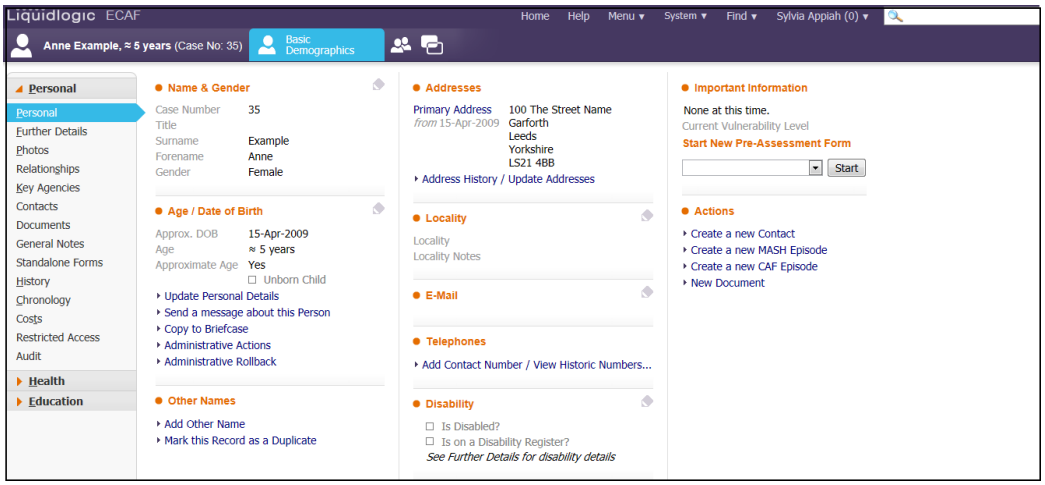
Demographic Icons and Tabs

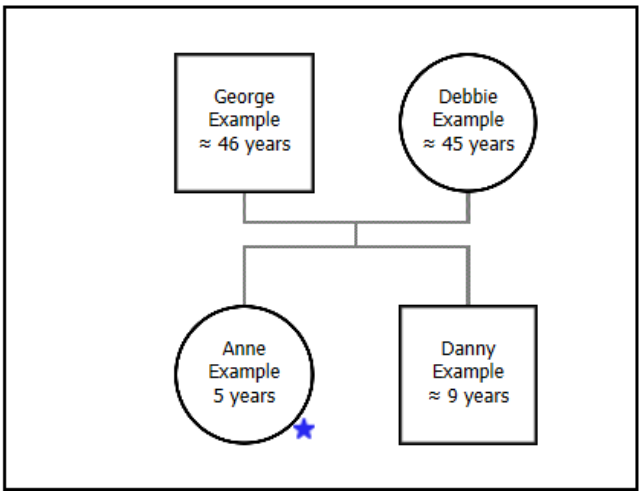
Once you have accessed a child records, you will be presented with the demographics as shown below. There are icons and tabs on this page which will help the user navigate through the system.



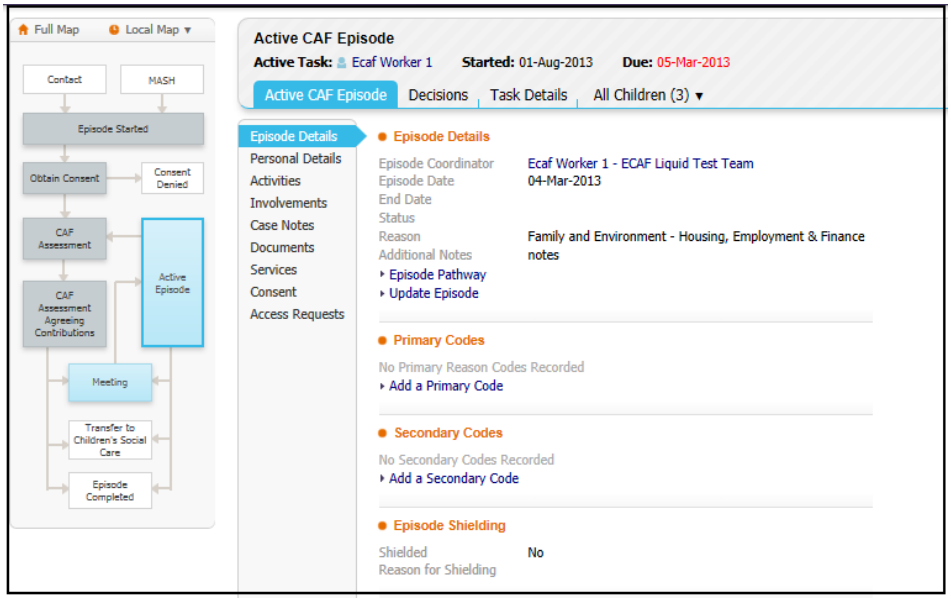
Child's Demographics – click on this icon to be taken to the child/young person's main demographic page. (See above) You will notice that whenever the demographic icon is selected you will be taken back to the last tab that was viewed for this child. Click on the **Personal** tab to view the personal details.

My View - click on this icon to configure **My View**

Genogram – click on this icon to view or create genogram. A new genogram will display all family members that have been set up on the **Relationships** tab.



Case Pathways – click this link to view the latest case pathway and episode details for the child. Case Pathways are covered in more detail within the Episode document.



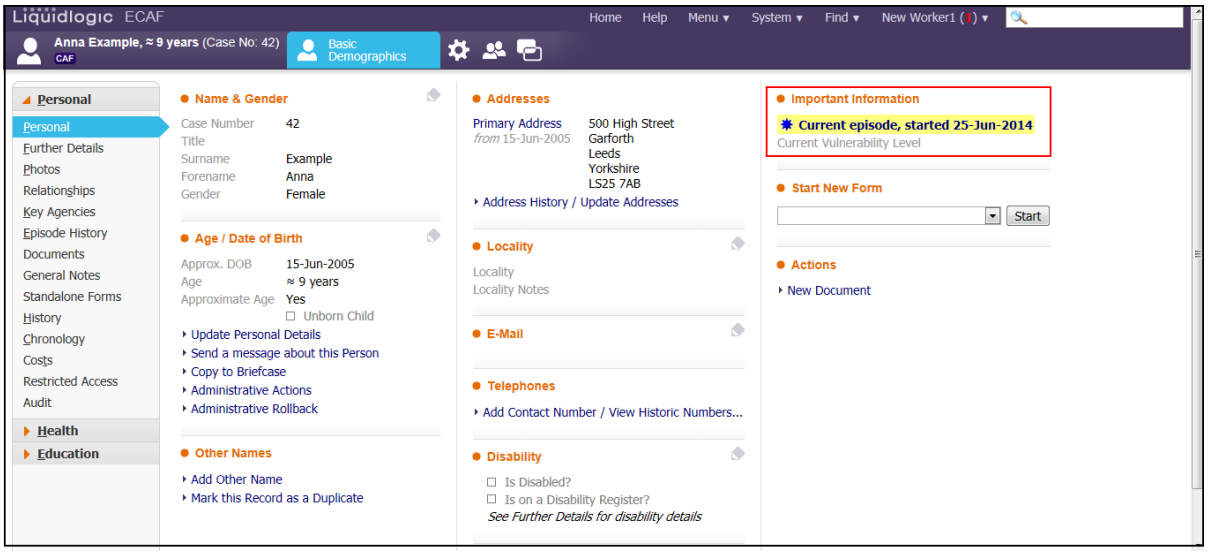
Child's Demographics

Once you have searched for and selected a child's record, a set of tabs will be displayed that hold information on that person. These are referred to as the child's **Basic Demographics**. Please refer to the **General** User Manual for further details on searching.

Depending upon your profile you will be able to view/update certain information on each of the tabs.

This document explains how to view/update and create details to enhance the child's demographics. The demographic details will also help form other information that is held elsewhere in the system. Whenever you are within a child's record, you can retrieve their demographics at any time by clicking on the demographic icon at the top of the page.

If a child has a current episode, it will be displayed under the important information



Personal Tab

The **Personal** tab holds information relating to the personal details and address(es) of the selected record. This tab also includes a section for any important information; this will be highlighted not only for the child but any related persons or people with the same address.

All of the information held under the heading **Important Information** can be clicked on to view further details. If the important information is directly linked to the child you will be taken to the relevant part of the child's record or if the important information is about a related person or someone at the same address you will be taken to the other person's record.

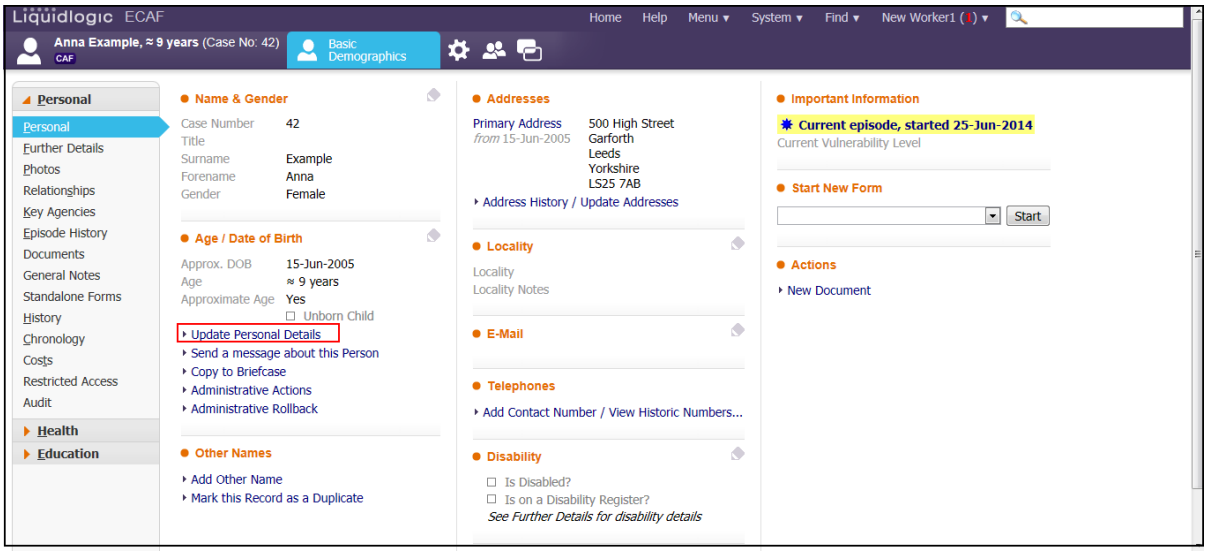
The **Personal** tab also provides a link to create a **New Episode** if one does not already exist. If the child has a current episode, the option to create a new episode will be unavailable.

For more information on creating a new episode please refer to the **Episode** user manual.

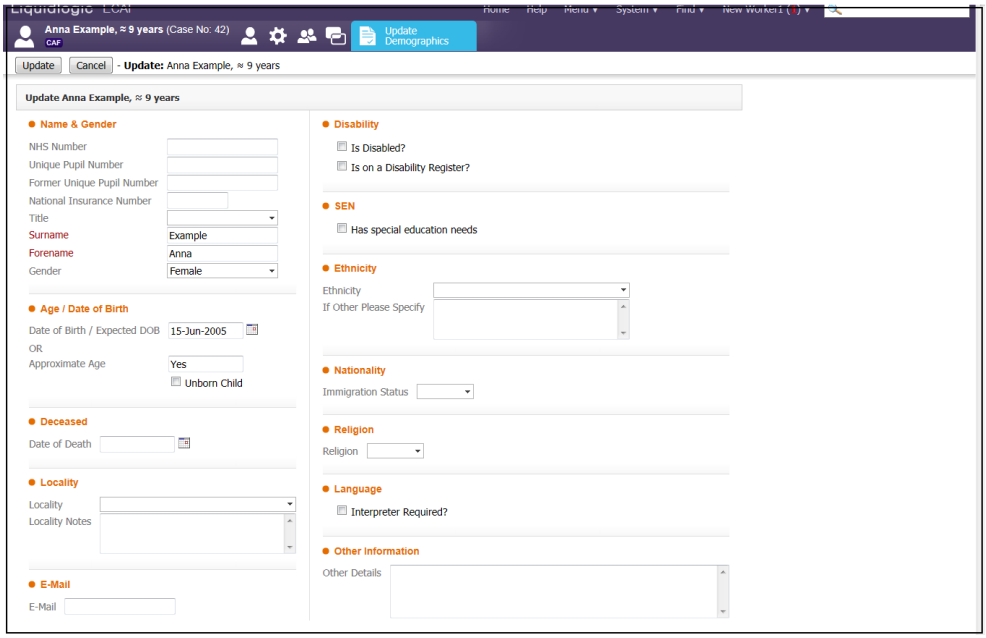
Updating Personal Details

Details on the **Personal** tab can be updated at any time. The 'Update Personal Details' option also enables information on both the **Personal** and **Further Details** tabs to be modified. This includes Name and Date of Birth/Death, Locality, SEN, Ethnicity, Immigration, Nationality, Religion and whether an interpreter is required.

1. Click **Update Personal Details**

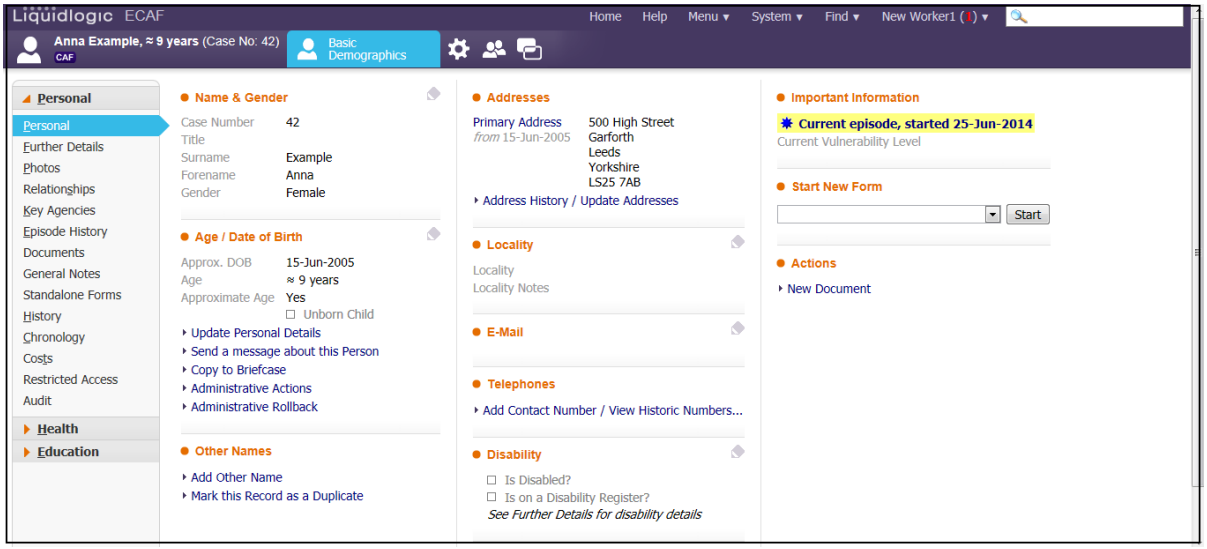


2. Enter the additional/updated information and then click on the **Update** button

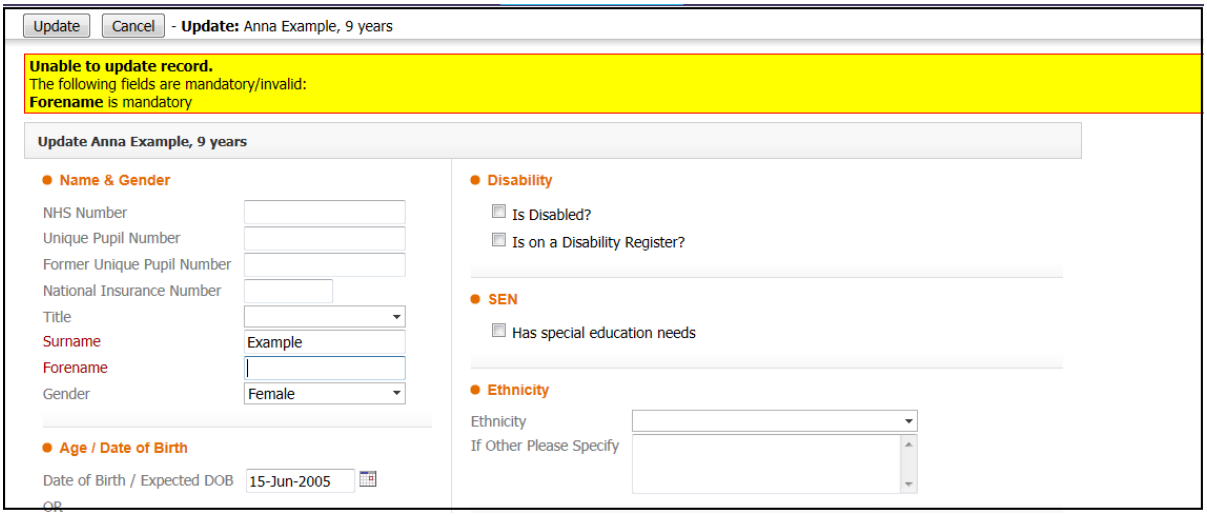


TIP: Any fields shown in **red**, indicate that the field is mandatory and must contain data

Once updated, all tabs within the child's demographics will be displayed again.



NOTE: The system will prompt the user if any information has been entered incorrectly or if a mandatory field is not completed as the record cannot be updated. Any invalid or missing information will be highlighted in a yellow box at the top of the screen.

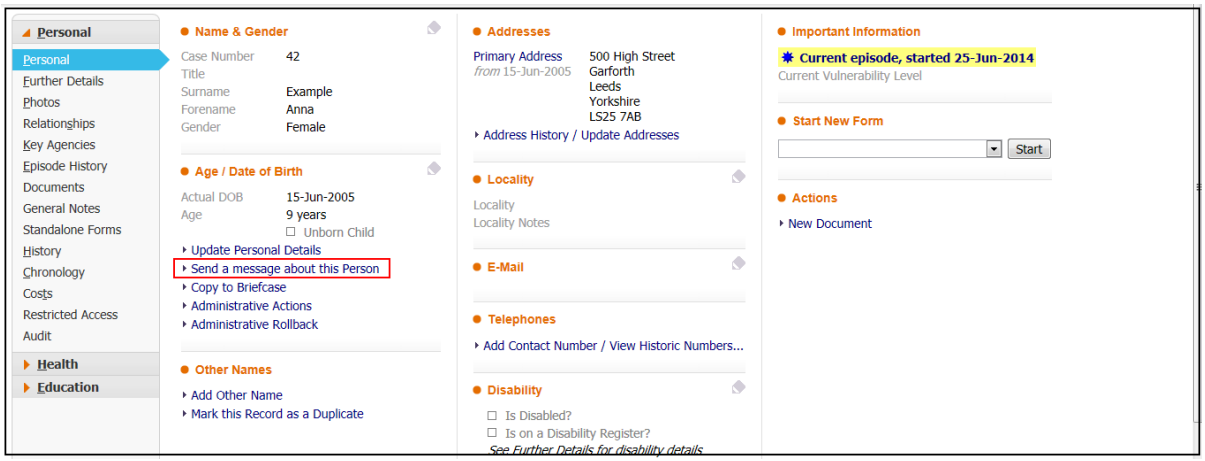


Sending Messages

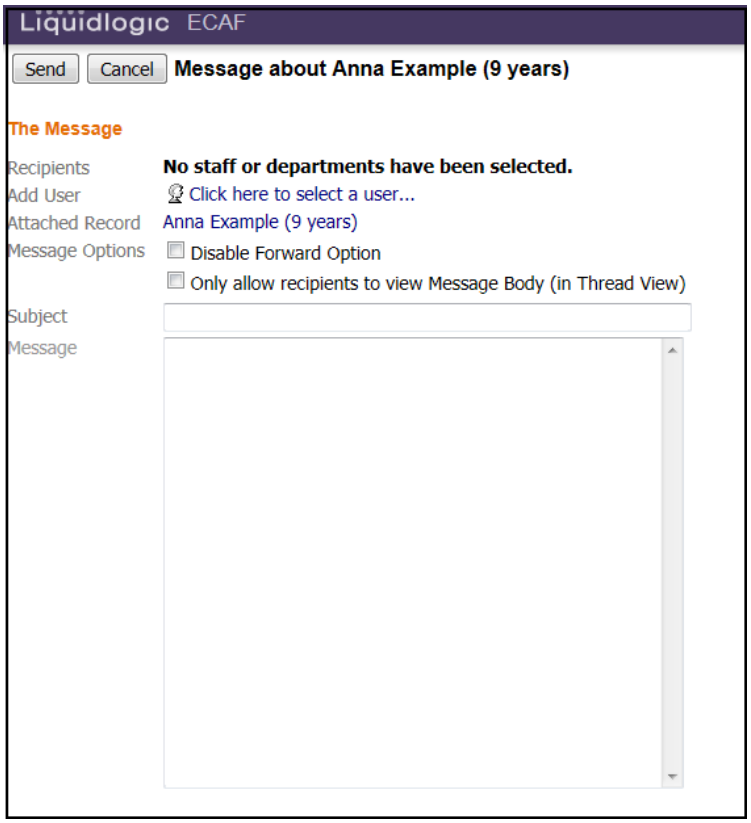
The system allows messages about a person, with an record, to be sent to other professionals with access to PROTOCOL .

1. To send a message about a person navigate to the **Personal** tab on the demographics record

2. Click **Send a message about this Person**

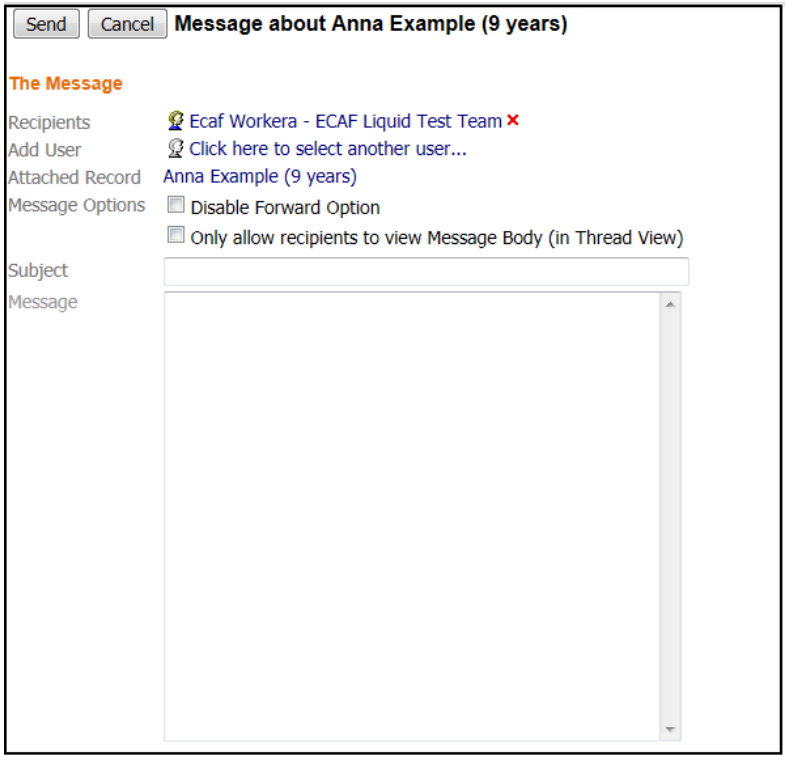


3. Select the **Click here to select a user…**link to choose the recipient. The **My Contacts** section of the **Address Book** will be displayed



NOTE: For further guidance on using the Address Book please refer to the **General** User Manual

4. Select an active professional or department from the Address Book. The recipient will then be recorded on the message



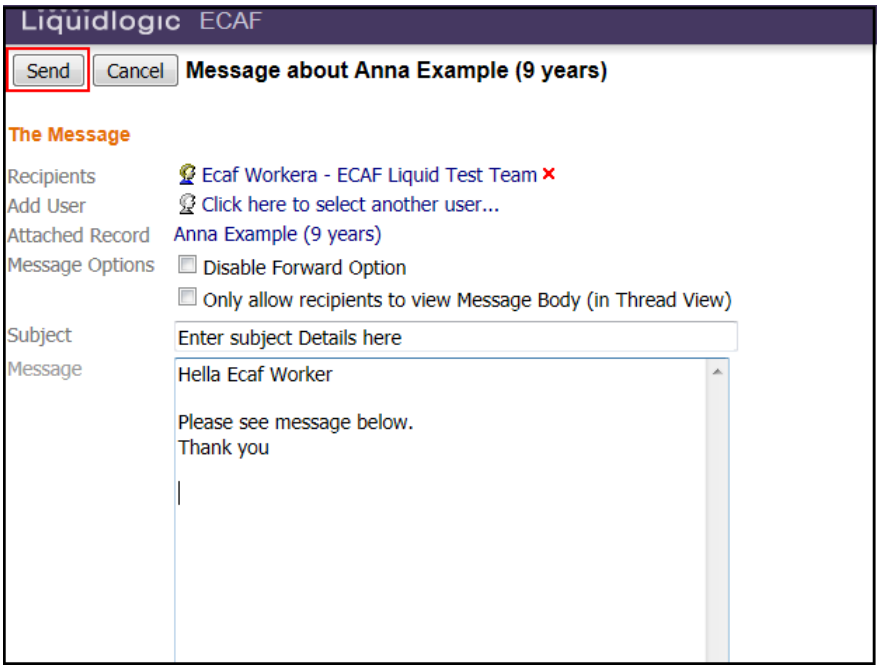
To remove a recipient on a message click on the ✖ against the recipient's name

5. To add multiple recipients for a message repeat **steps 3 and 4** (above)
6. Select the appropriate **Message Options**

Message Options Explained:

Disable Forward Option	If selected, removes the ability for recipients to forward the message they have received
Only allow recipients to view Message Body (in Thread View)	If selected, removes the ability for recipients to view the Message Body in the Incoming Message View. Message Body will only be viewable in the Thread View

7. Enter a **Subject** and **Message**

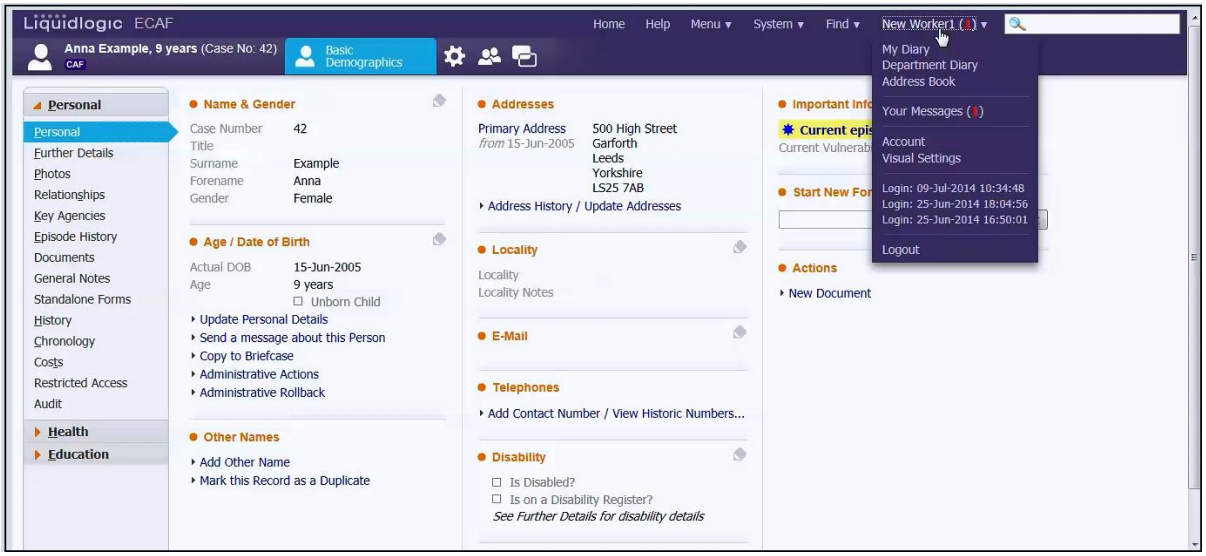


8. Click **Send**

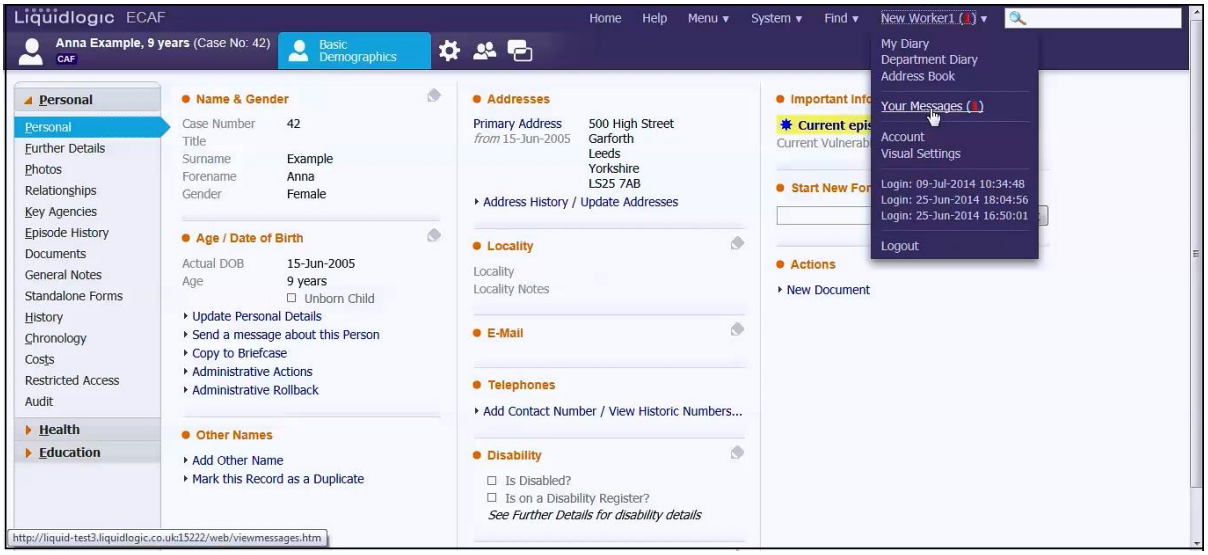
The message will be sent to all recipients listed.

Viewing Sent Items

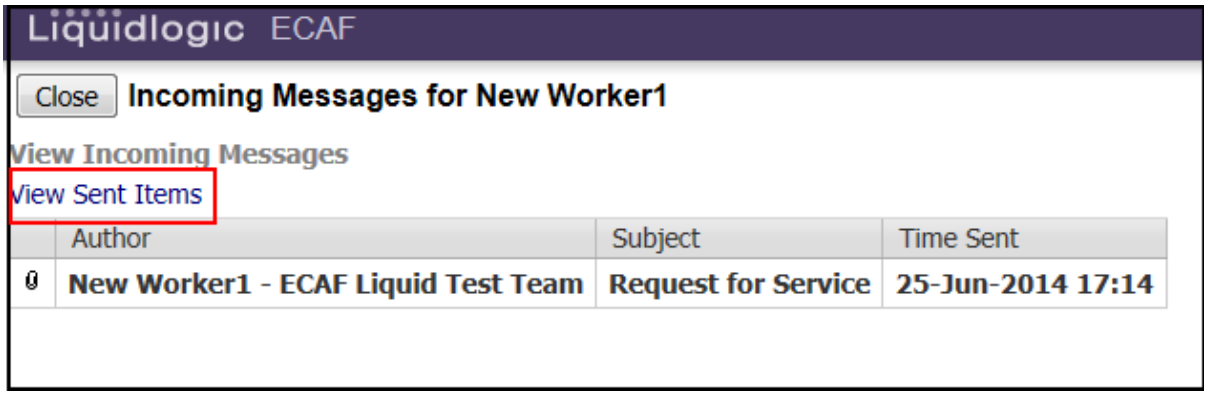
1. Click the **Your Name** (in this example New Worker as shown below) **from the home page** link on the PROTOCOL Homepage



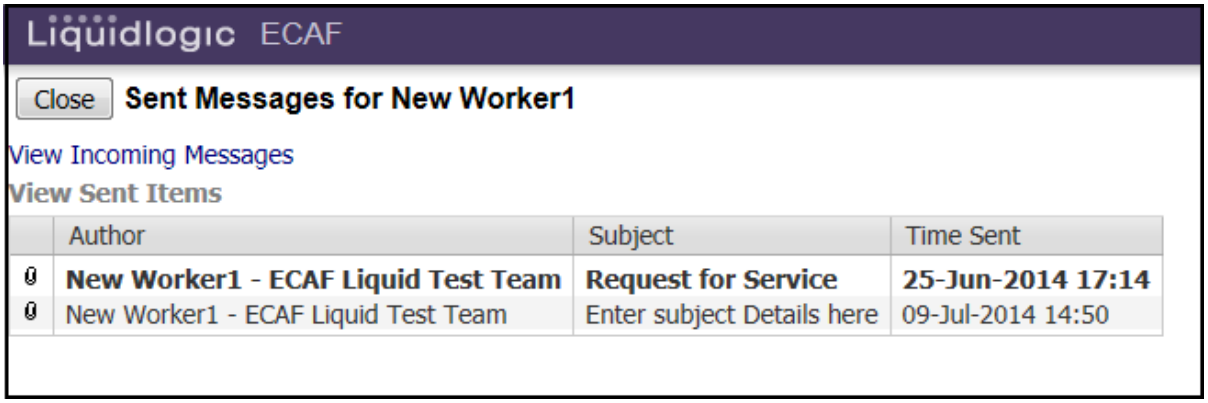
2. Click on **Your messages**



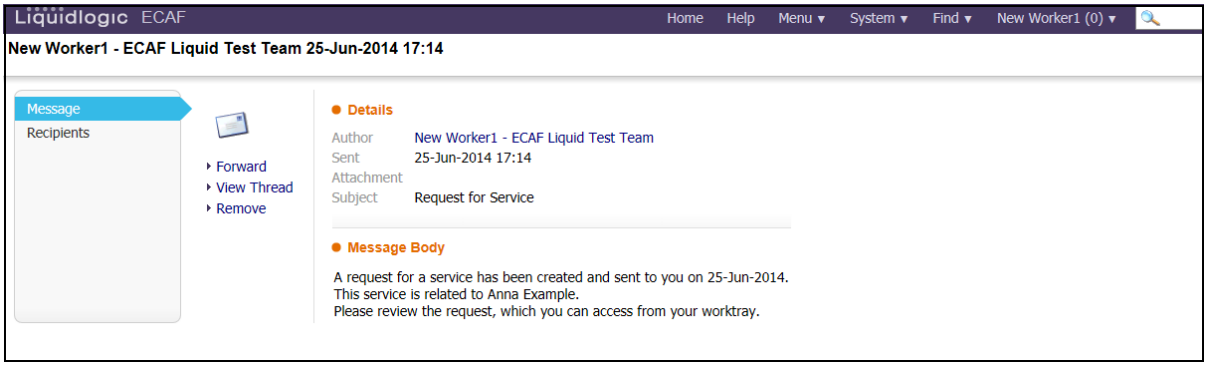
3. Click **View Sent Items**



4. All messages sent by you will be displayed, Click on the specific message you want to view



The full message will open and a number of actions can be performed



Action	Description
Forward	To forward the selected message to further recipients
View Thread	To view the complete message thread/trail relating to the selected message
Remove	To permanently remove the selected message from your sent items

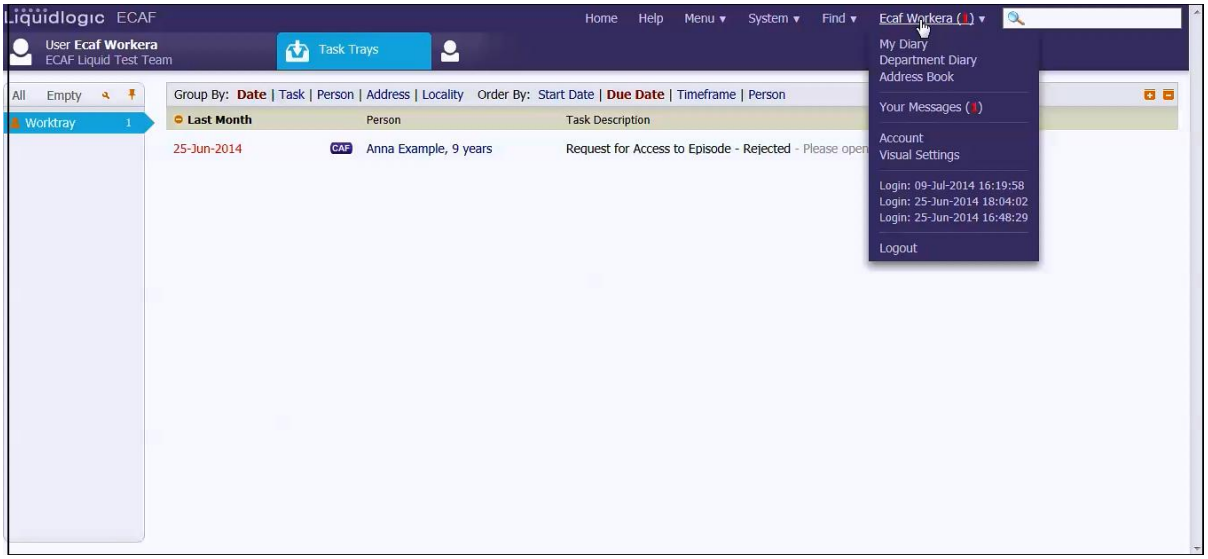
5. Select the **Recipients** tab to view the recipients this message was originally sent to

6. To close the message and return to your Homepage, Click the **Home** link

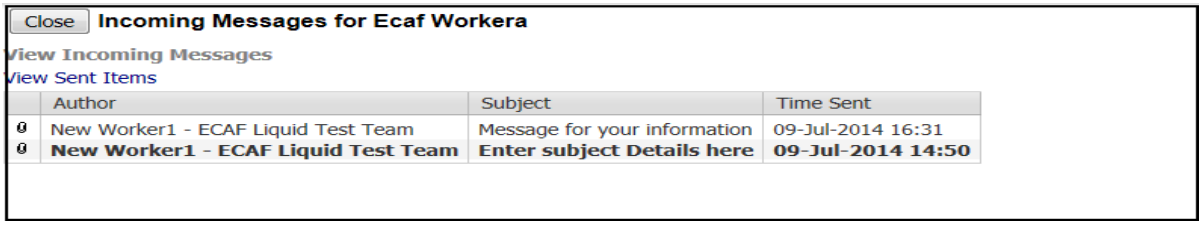
Receiving Messages

If an active user of PROTOCOL has been sent a message generated by another active user of PROTOCOL then the following steps illustrate how to access received messages.

1. Click the **Your Name (users name)** link on the PROTOCOL Homepage. The number of new messages received will also be specified in **RED**



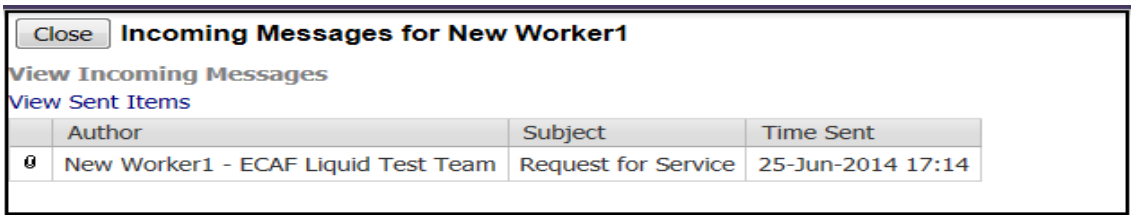
All messages received will be listed. Those messages in **Bold** text indicate unread messages, those messages not bold indicate the messages which have been viewed/read.



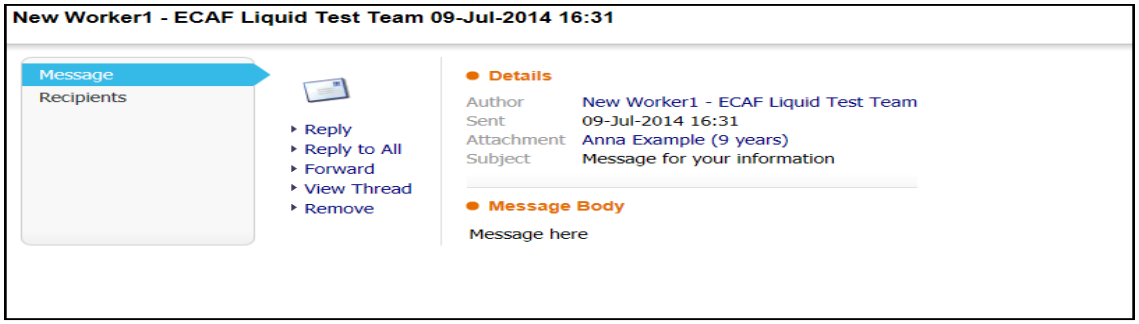
Viewing Incoming Messages

1. Follow the steps in the **Receiving Messages** section of this user manual

2. Click on the message to be read/viewed from the incoming messages listed



The full message will open and a number of actions can be performed:



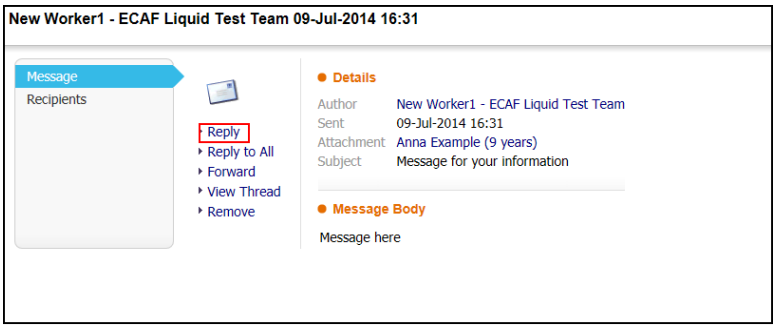
Action	Description
Reply	To reply to author of the message
Reply to All	To reply to the author and all other recipients of the specific message
Forward	To forward the selected message to further recipients
View Thread	To view the complete message thread/trail relating to the selected message
Remove	To permanently remove the selected message from your Incoming Messages View

3. After viewing/reading the message, to return to the Homepage, Click the **Home** link. Alternatively perform the necessary action regarding the message, refer to the next section for **Message Actions**.

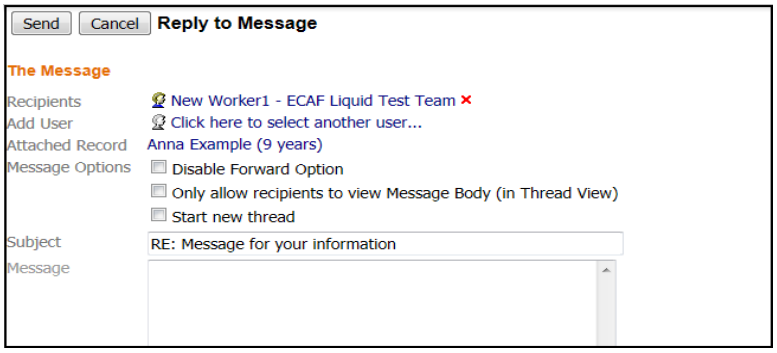
Message Actions

Reply

1. To reply to a message, Click **Reply**



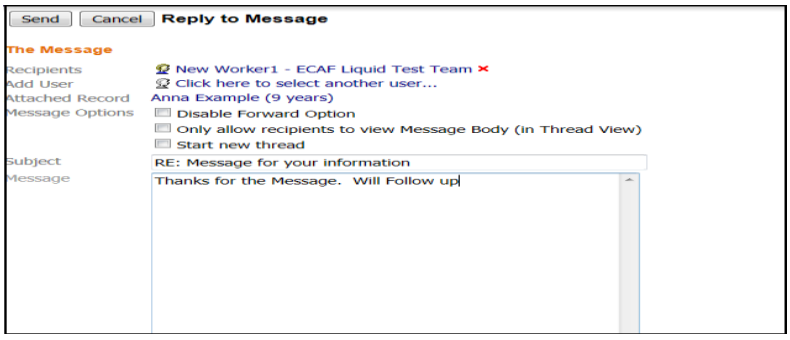
The reply message will appear on screen, with the recipient defaulted to the original author of the message.



2. Add a **further recipient** (if required), select the appropriate **Message Options**

The **Start new thread** option enables the sender to start a new message trail rather than continuing the current thread

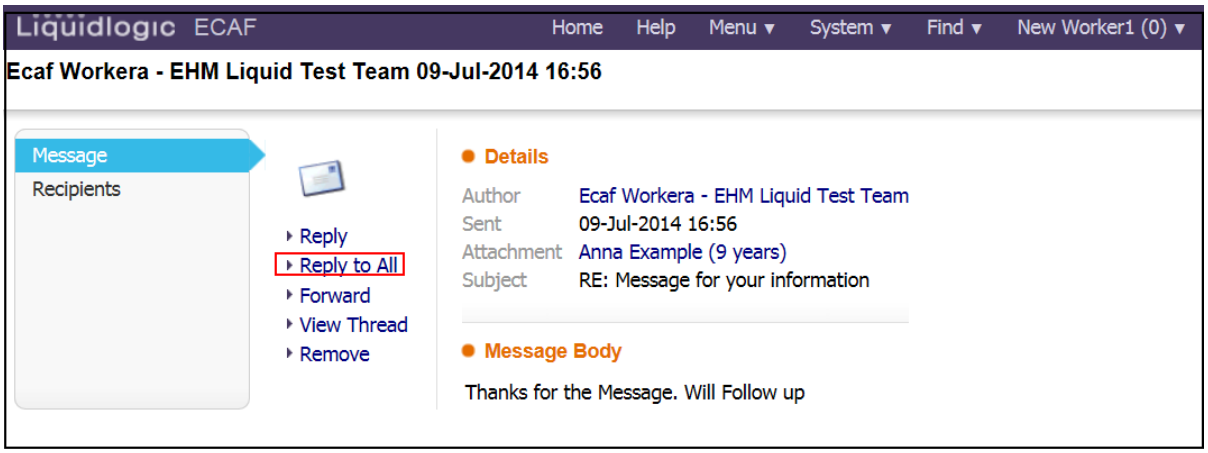
3. Enter **Message** details and then click **Send**



Reply to All

If a message has been sent to you and a number of other recipients you have the option to reply to the author of the message and all other recipients.

1. Click the **Reply to All** link on the message



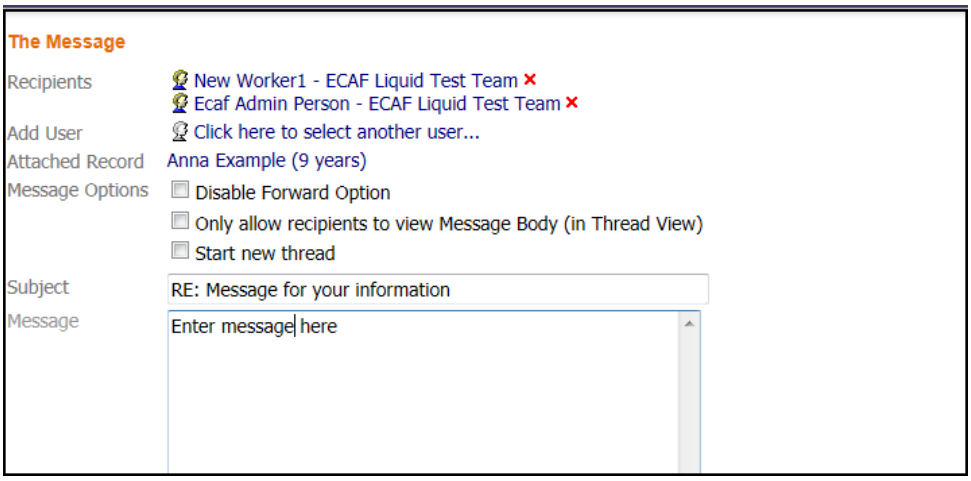
The reply message will appear on screen, with all recipients appearing by default.

2. Add a **further recipient** (if required), select the appropriate **Message Options**

The **Start new thread** option enables the sender to start a new message trail rather than continuing the current thread

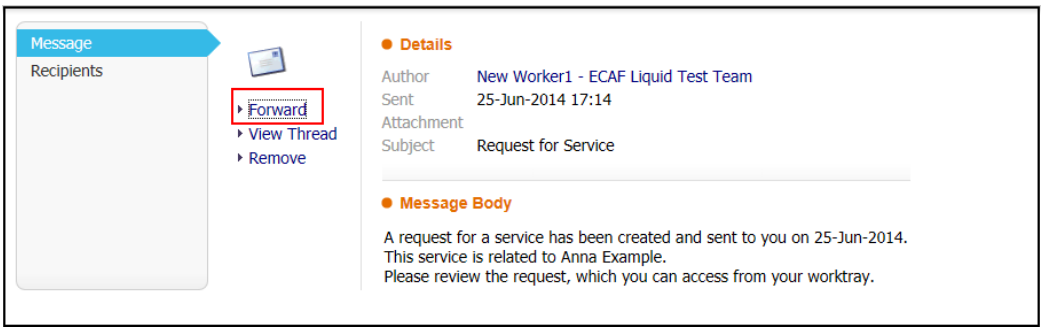
3. Enter **Message** details

4. Click **Send**



Forward

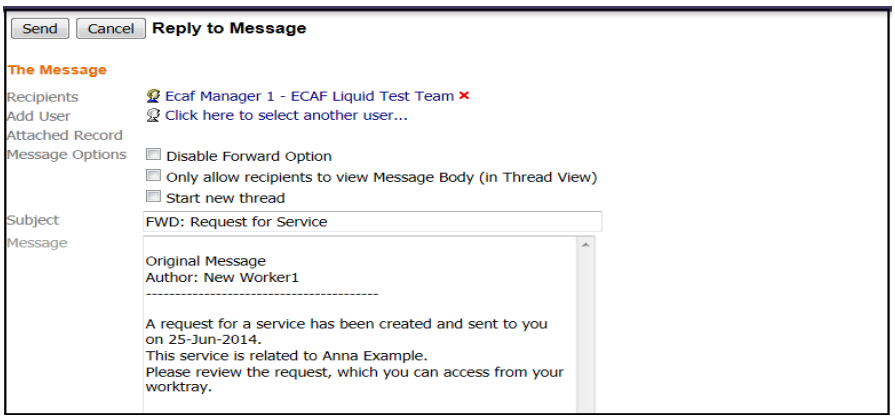
1. Click the **Forward** link on the message


Message
Recipients
Forward
View Thread
Remove
Details
Author New Worker1 - ECAF Liquid Test Team
Sent 25-Jun-2014 17:14
Attachment
Subject Request for Service
Message Body
A request for a service has been created and sent to you on 25-Jun-2014.
This service is related to Anna Example.
Please review the request, which you can access from your worktray.

The original message is displayed in the message body, additional text can be added to the message for the recipient to read.

2. Select the **Click here to select a user…** link to choose the recipient from your My Contacts

3. Click **Send**

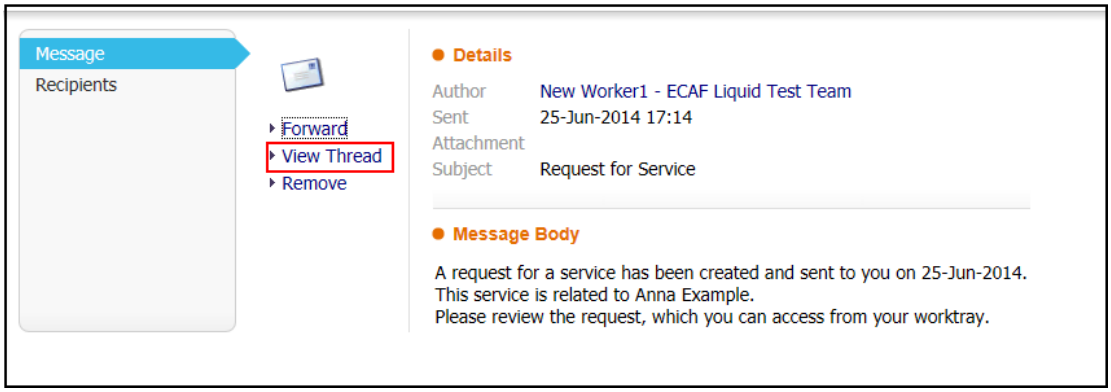

Send
Cancel
Reply to Message
The Message
Recipients
Ecaf Manager 1 - ECAF Liquid Test Team
Add User
Click here to select another user...
Attached Record
Message Options
Disable Forward Option
Only allow recipients to view Message Body (in Thread View)
Start new thread
Subject
FWD: Request for Service
Message
Original Message
Author: New Worker1
A request for a service has been created and sent to you on 25-Jun-2014.
This service is related to Anna Example.
Please review the request, which you can access from your worktray.

TIP: The author/sender of a message can select the **Disable Forward Option**, this would mean the recipient would not have the ability to carry out the above steps and forward the message on to others. The recipient would be notified the **message cannot be forwarded** (below).

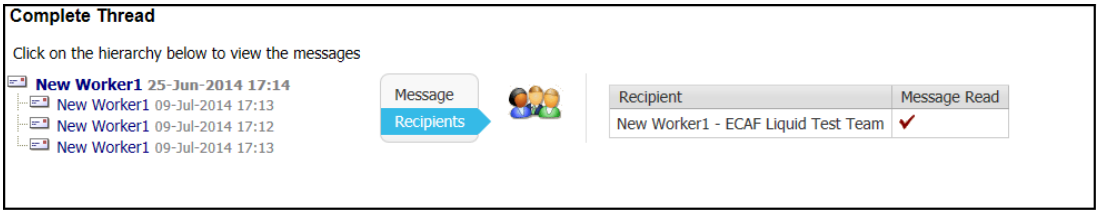
View Thread

To view a history of the responses to a message between people a message thread can be viewed

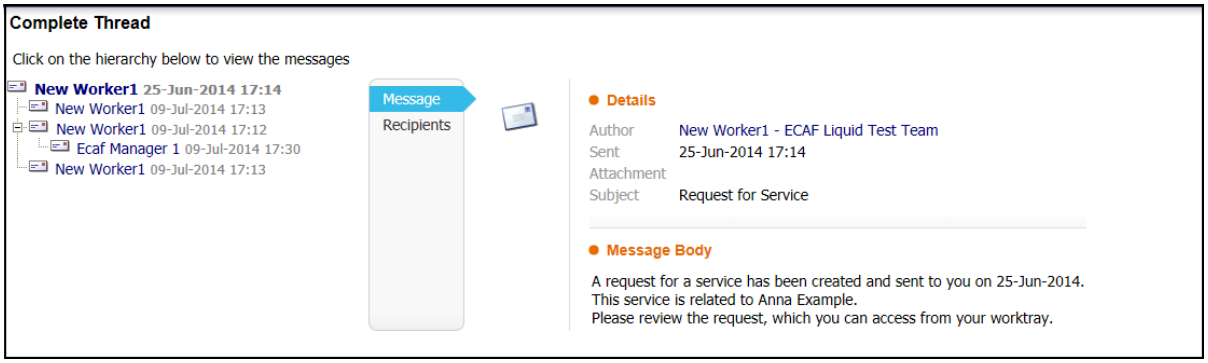
1. Click the **View Thread** link on the message


Message
Recipients
Forward
View Thread
Remove
Details
Author New Worker1 - ECAF Liquid Test Team
Sent 25-Jun-2014 17:14
Attachment
Subject Request for Service
Message Body
A request for a service has been created and sent to you on 25-Jun-2014.
This service is related to Anna Example.
Please review the request, which you can access from your worktray.

2. A hierarchy of the responses in relation to the message appears



3. To view the specific messages included within the chosen message thread, Click on the message in the hierarchy


Complete Thread
Click on the hierarchy below to view the messages
New Worker1 25-Jun-2014 17:14
New Worker1 09-Jul-2014 17:13
New Worker1 09-Jul-2014 17:12
Ecaf Manager 1 09-Jul-2014 17:30
New Worker1 09-Jul-2014 17:13
Message
Recipients
Details
Author New Worker1 - ECAF Liquid Test Team
Sent 25-Jun-2014 17:14
Attachment
Subject Request for Service
Message Body
A request for a service has been created and sent to you on 25-Jun-2014.
This service is related to Anna Example.
Please review the request, which you can access from your worktray.

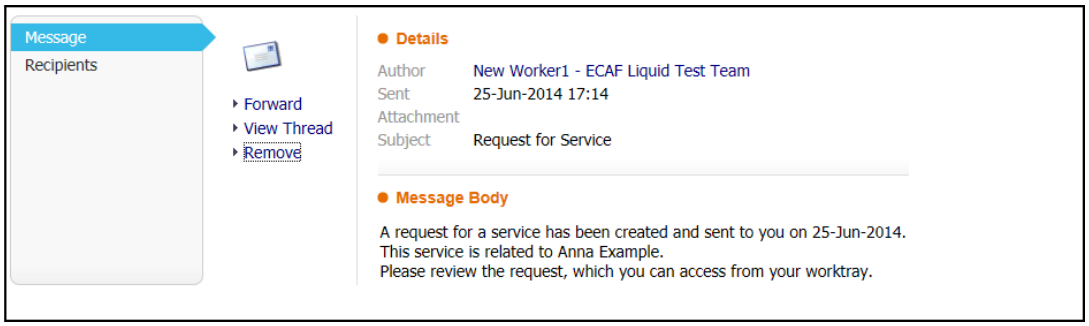
The message will appear on the right-hand side of the screen

4. To **expand** or **collapse** parts of the message hierarchy, Click on the **+/-** options

5. To exit the message thread and return to the Homepage, Click the **Home** link

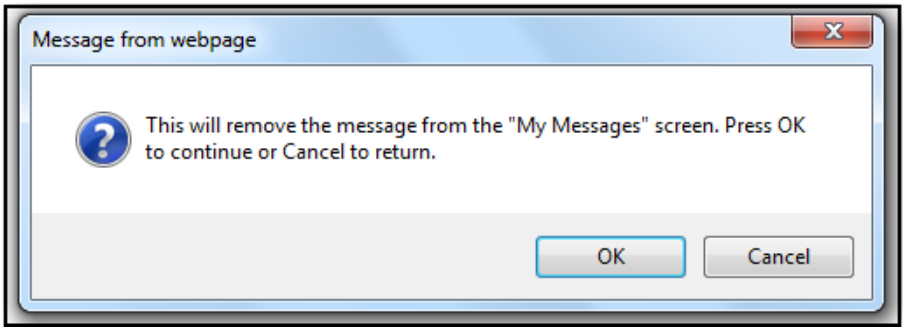
Remove

1. Click the **Remove** link on the message


Message
Recipients
Forward
View Thread
Remove
Details
Author New Worker1 - ECAF Liquid Test Team
Sent 25-Jun-2014 17:14
Attachment
Subject Request for Service
Message Body
A request for a service has been created and sent to you on 25-Jun-2014.
This service is related to Anna Example.
Please review the request, which you can access from your worktray.

The following warning message will appear. If you choose to remove a message, the message will no longer exist in your 'My Messages'. The message will **NOT** be saved elsewhere on your account.

2. Click **OK** to confirm the removal of the message, alternatively Click **Cancel** to keep the message


Message from webpage
This will remove the message from the "My Messages" screen. Press OK to continue or Cancel to return.
OK
Cancel

Copy to Briefcase

If Briefcase is installed and enabled then a user will have the ability to copy the demographic record to their Briefcase in order to update/view the details remotely.

1. From the Personal tab click **Copy to Briefcase**

NOTE: Please refer to the **Briefcase** manual for further details.

Other Names

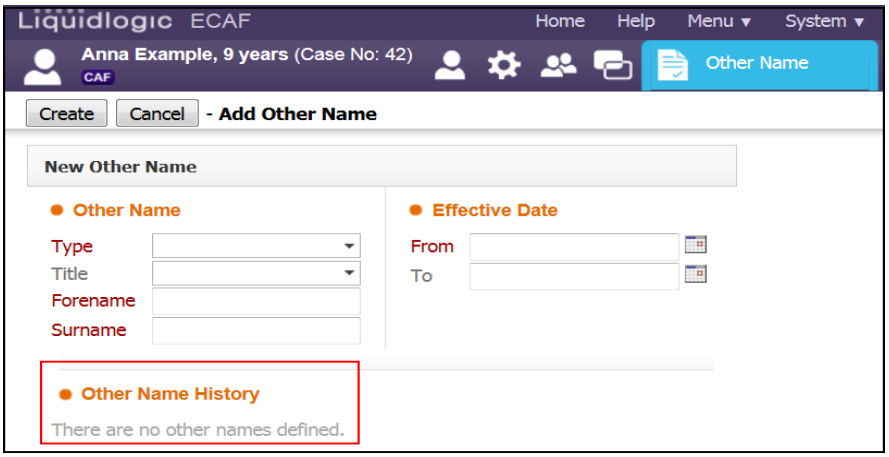
The system has the ability to store one or more names for a child. Aliases will also be considered when searching for a child.

The child's demographics must be displayed with the **Personal** tab selected in order to view, update or add other names/alias's to a child's record.

Adding Other Names

1. Click on the link **Add Other Name** from the **Personal** tab

If the child already has one or more aliases recorded, they will be listed under the Other Name History section.



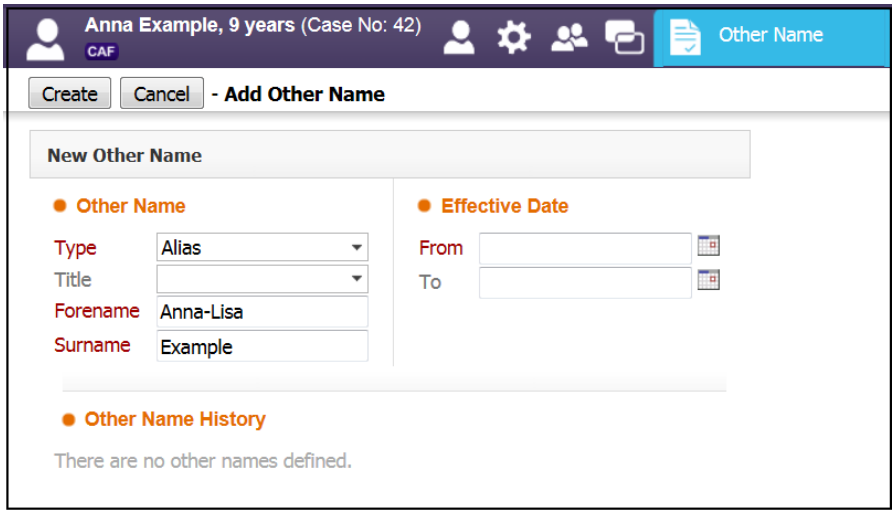
2. Specify the Other Name **Type** from the drop-down selection

3. Choose the **Title** from the drop-down selection

4. Enter the **Forename** and **Surname** in their respective fields

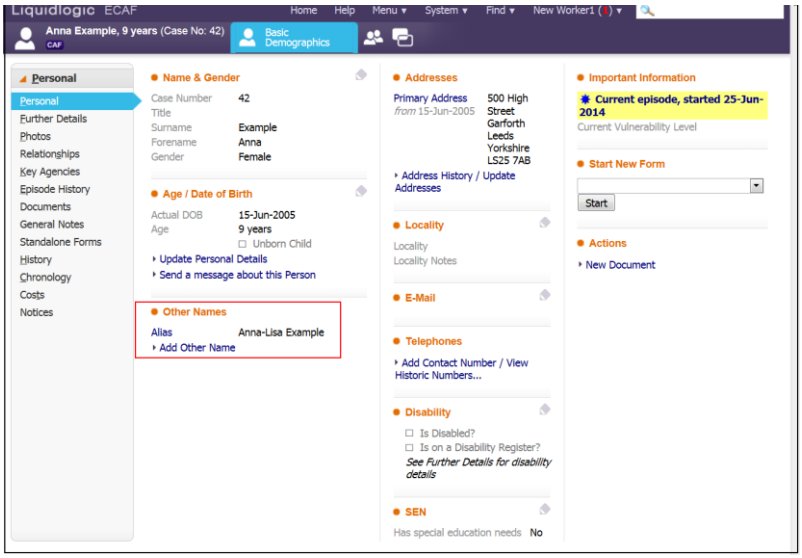
NOTE: Both the forename and surname are mandatory fields and must be entered

5. The Effective **From** date will default to today's date, but can be changed if required



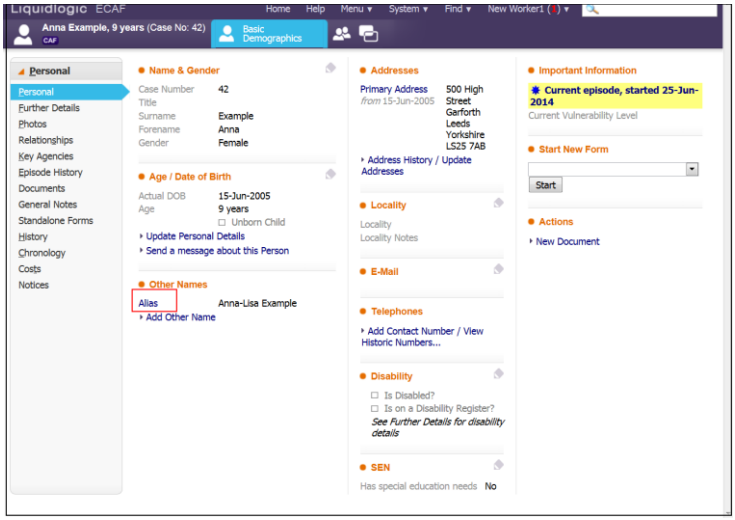
6. Click **Create**

Your alias will now have been added to the child's record.

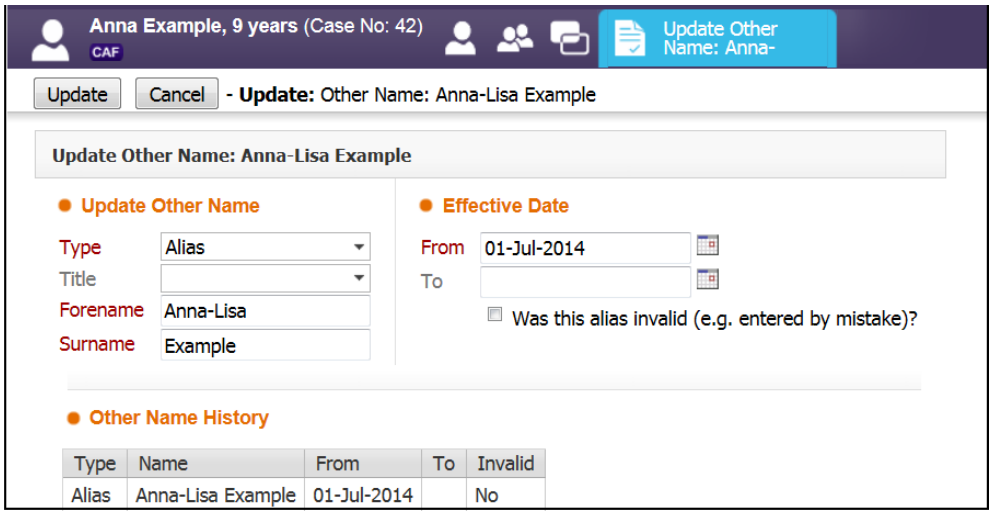


Updating Other Names

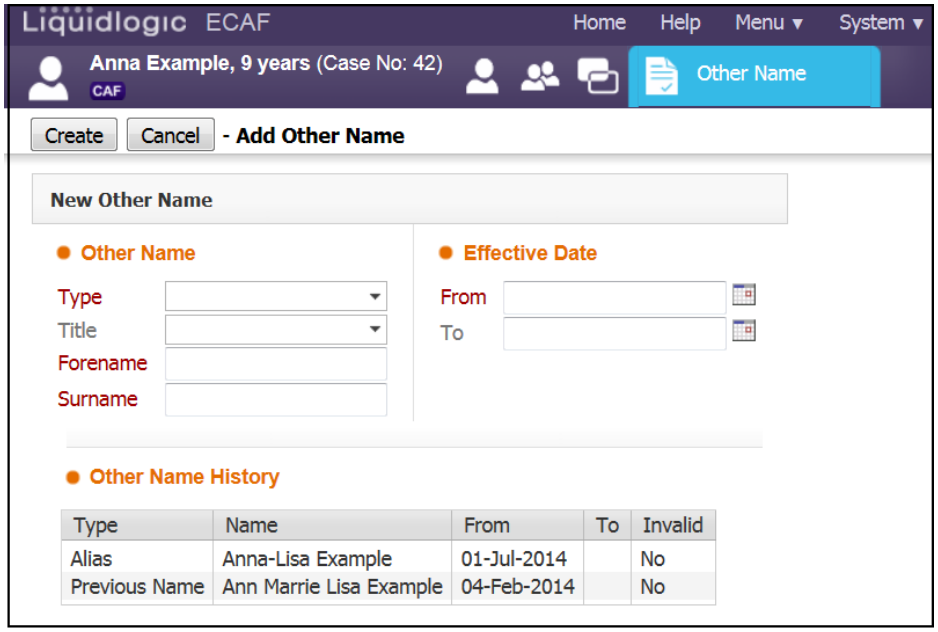
1. Click on the link referencing the Other Name **Type** you need to update from those listed within the Other Names section on the child's **Personal** tab



2. The **Other Name** will appear in an editable screen, see below:

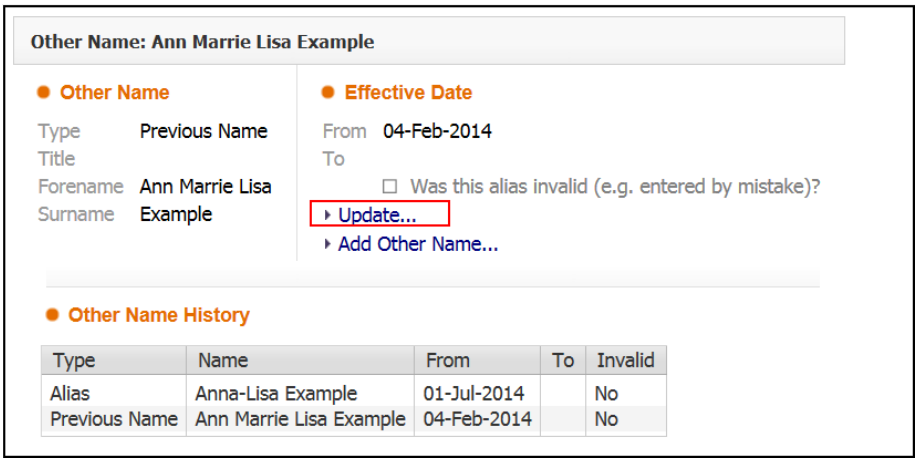


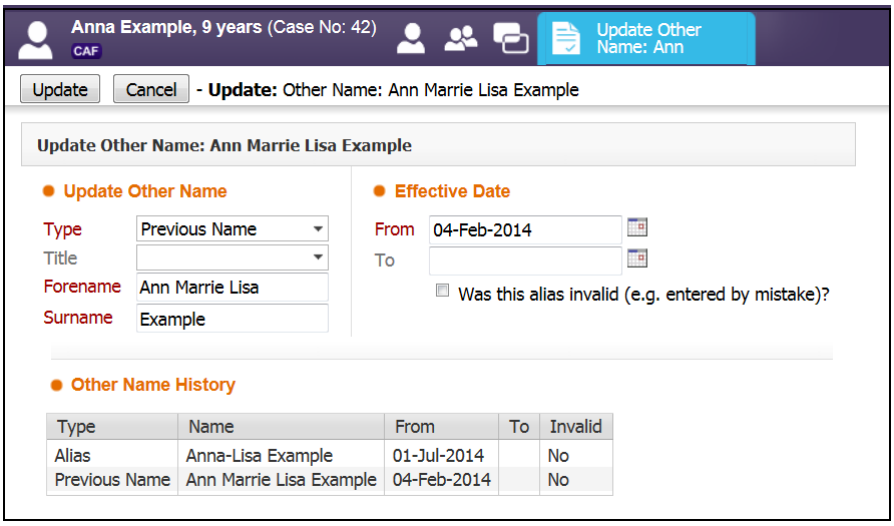
Alternatively, if the child has multiple Other Names recorded then the Click **Add Other Name** link from the personal tab.



Once you have selected the alias that you want to update, the alias details will be displayed:

3. Enter the details that need amending and click **Update**

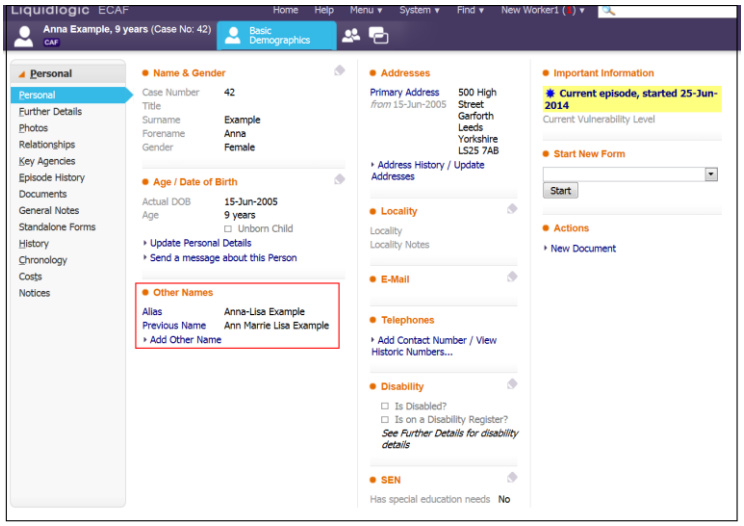

Other Name: Ann Marrie Lisa Example
Other Name
Type Previous Name
Title
Forename Ann Marrie Lisa
Surname Example
Effective Date
From 04-Feb-2014
To
Was this alias invalid (e.g. entered by mistake)?
Update...
Add Other Name...
Other Name History
Type | Name | From | To | Invalid
Alias | Anna-Lisa Example | 01-Jul-2014 | | No
Previous Name | Ann Marrie Lisa Example | 04-Feb-2014 | | No


Anna Example, 9 years (Case No: 42)
CAF
Update Other Name: Ann
Update
Cancel
- Update: Other Name: Ann Marrie Lisa Example
Update Other Name: Ann Marrie Lisa Example
Update Other Name
Type Previous Name
Title
Forename Ann Marrie Lisa
Surname Example
Effective Date
From 04-Feb-2014
To
Was this alias invalid (e.g. entered by mistake)?
Other Name History
Type | Name | From | To | Invalid
Alias | Anna-Lisa Example | 01-Jul-2014 | | No
Previous Name | Ann Marrie Lisa Example | 04-Feb-2014 | | No

NOTE: Any **Other Name** recorded can be marked as invalid using the **Was this Alias invalid?** check box. The names which are marked as invalid cannot be used when searching for the child in .

This will display the alias details. Click the icon to return to the child's demographics.

All names for the child will also be displayed on the child/young person's **Personal** tab

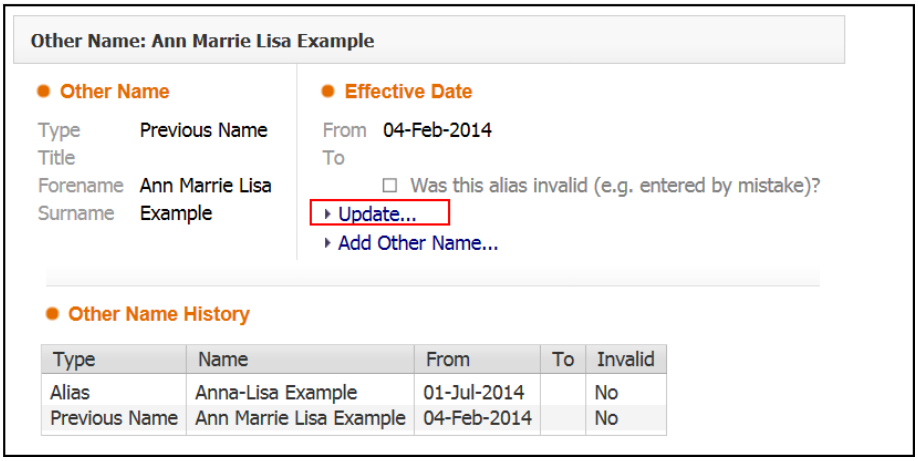


Invalid and Historical Other Names

Other Names that are either out of date or invalid can be updated by clicking on the **Add Other Name** link from the child's **Personal** tab.

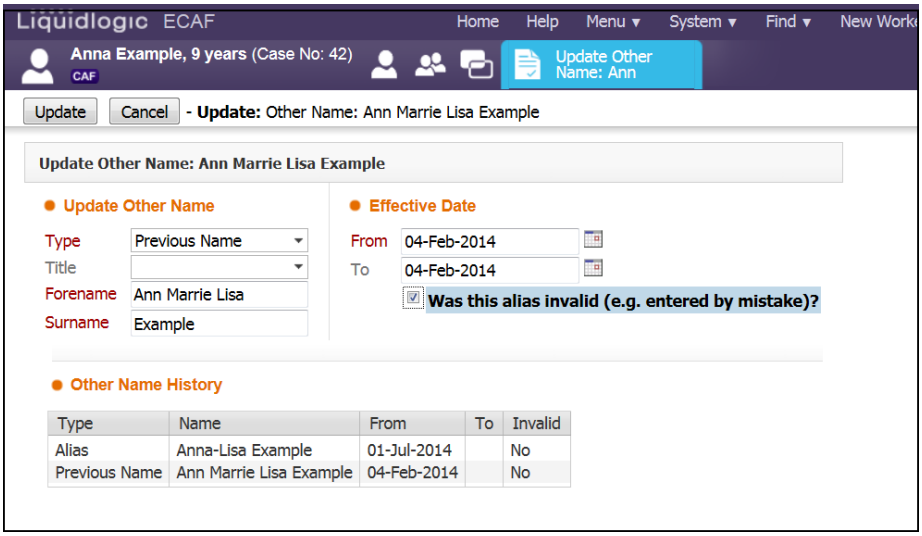
1. Click on the **Other Name** to be changed from the **Other Name History** section

2. Click **Update**



3. Enter an **end date** using the effective **To** field or select the **Was this Alias Invalid?** check box

4. Click **Update**


Liquidlogic ECAF
Home Help Menu System Find New Work
Anna Example, 9 years (Case No: 42)
CAF
Update Other Name: Ann
Update Cancel - Update: Other Name: Ann Marrie Lisa Example
Update Other Name: Ann Marrie Lisa Example
Update Other Name
Type Previous Name
Title
Forename Ann Marrie Lisa
Surname Example
Effective Date
From 04-Feb-2014
To 04-Feb-2014
Was this alias invalid (e.g. entered by mistake)?
Other Name History
Type Name From To Invalid
Alias Anna-Lisa Example 01-Jul-2014 No
Previous Name Ann Marrie Lisa Example 04-Feb-2014 No

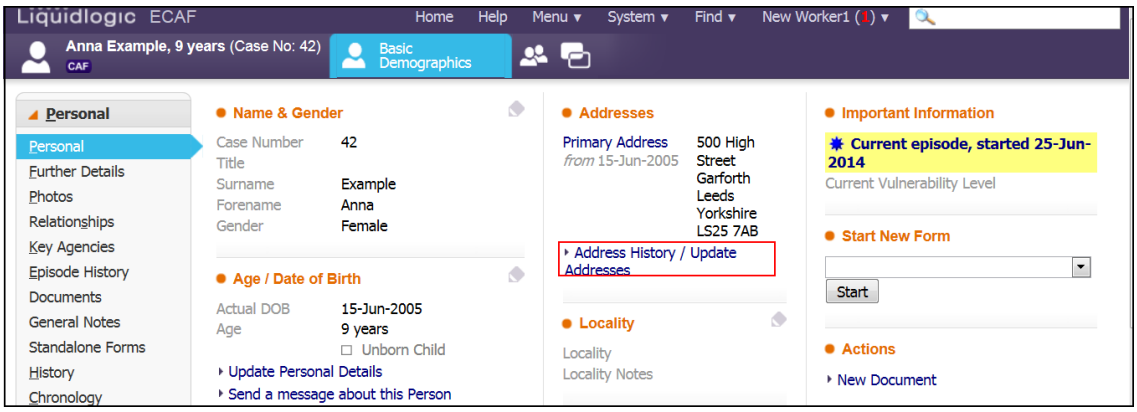
Addresses

Under the **Addresses** section of the **Personal** tab you are able to view any Primary, Secondary, Current or Short Break Care addresses that are held against the child's record.

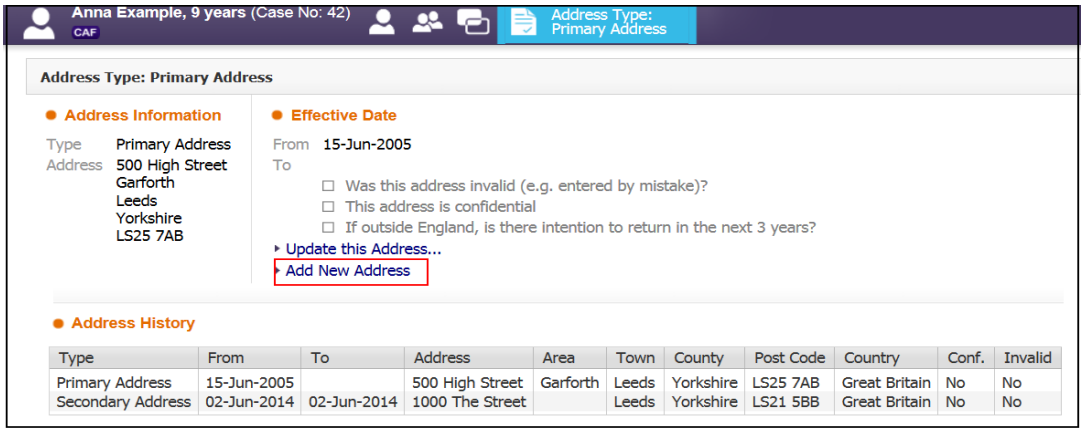
Adding a New Address

You are able to add a number of addresses for a child and keep a historical record of any addresses the child may have.

1. From the Personal tab, click **Address History/Update Addresses**



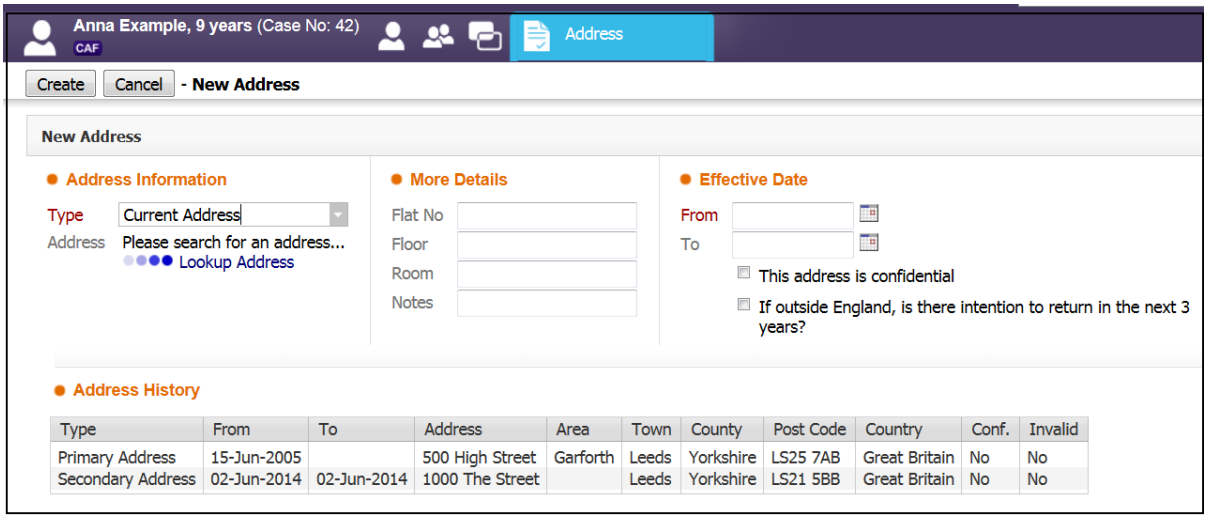
2. Click **Add new Address**


Anna Example, 9 years (Case No: 42)
CAF
Address Type: Primary Address
Address Type: Primary Address
Address Information
Type Primary Address
Address 500 High Street Garforth Leeds Yorkshire LS25 7AB
Effective Date
From 15-Jun-2005
To
Was this address invalid (e.g. entered by mistake)?
This address is confidential
If outside England, is there intention to return in the next 3 years?
Update this Address...
Add New Address
Address History
Type From To Address Area Town County Post Code Country Conf. Invalid
Primary Address 15-Jun-2005 500 High Street Garforth Leeds Yorkshire LS25 7AB Great Britain No No
Secondary Address 02-Jun-2014 02-Jun-2014 1000 The Street Leeds Yorkshire LS21 5BB Great Britain No No

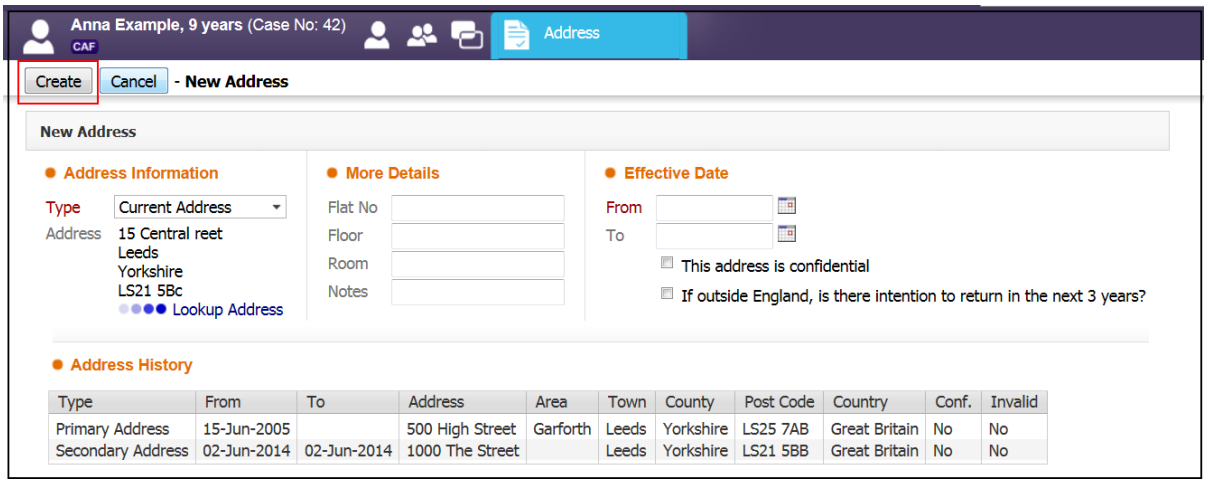
3. Choose the address **Type** from the dropdown selection

4. Select **Lookup Address** to enter the relevant details using your address gazetteer

For more information on using the gazetteer please refer to the **General** manual.

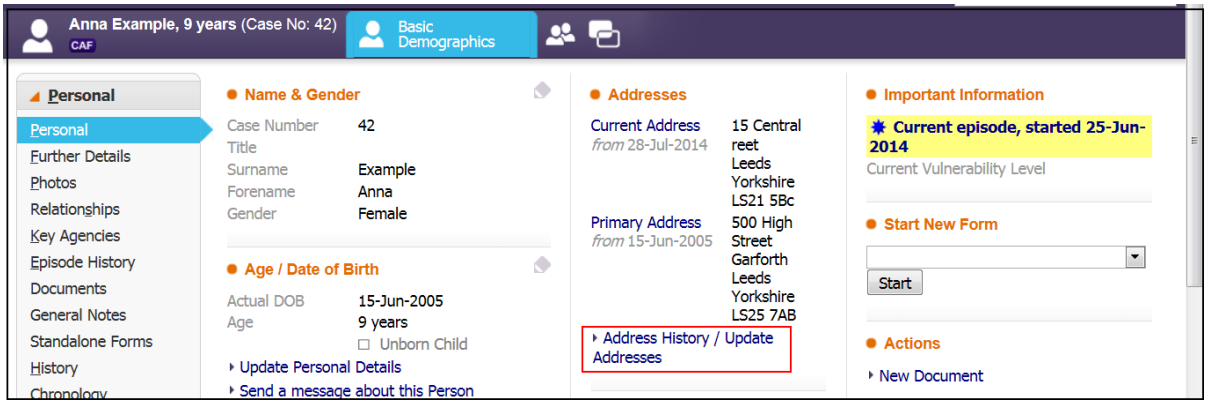

Anna Example, 9 years (Case No: 42)
CAF
Address
Create
Cancel
- New Address
New Address
Address Information
Type
Current Address
Address
Please search for an address...
Lookup Address
More Details
Flat No
Floor
Room
Notes
Effective Date
From
To
This address is confidential
If outside England, is there intention to return in the next 3 years?
Address History
Type | From | To | Address | Area | Town | County | Post Code | Country | Conf. | Invalid
Primary Address | 15-Jun-2005 | | 500 High Street | Garforth | Leeds | Yorkshire | LS25 7AB | Great Britain | No | No
Secondary Address | 02-Jun-2014 | 02-Jun-2014 | 1000 The Street | | Leeds | Yorkshire | LS21 5BB | Great Britain | No | No

5. Once the address has been entered, click **Create**


Anna Example, 9 years (Case No: 42)
CAF
Address
Create
Cancel
- New Address
New Address
Address Information
Type
Current Address
Address
15 Central reet
Leeds
Yorkshire
LS21 5Bc
Lookup Address
More Details
Flat No
Floor
Room
Notes
Effective Date
From
To
This address is confidential
If outside England, is there intention to return in the next 3 years?
Address History
Type | From | To | Address | Area | Town | County | Post Code | Country | Conf. | Invalid
Primary Address | 15-Jun-2005 | | 500 High Street | Garforth | Leeds | Yorkshire | LS25 7AB | Great Britain | No | No
Secondary Address | 02-Jun-2014 | 02-Jun-2014 | 1000 The Street | | Leeds | Yorkshire | LS21 5BB | Great Britain | No | No

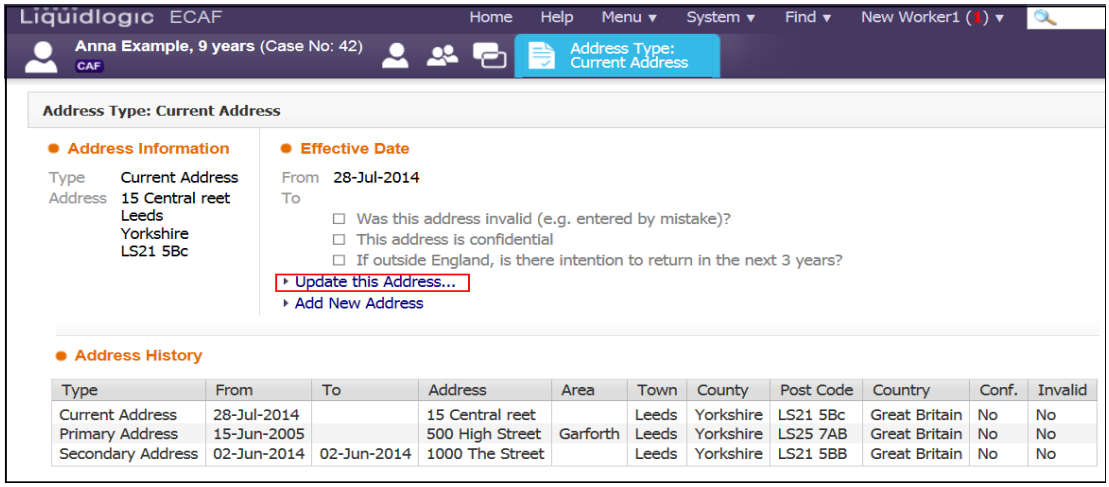
Updating an Address

1. From the Personal tab, click **Address History/Update Addresses**



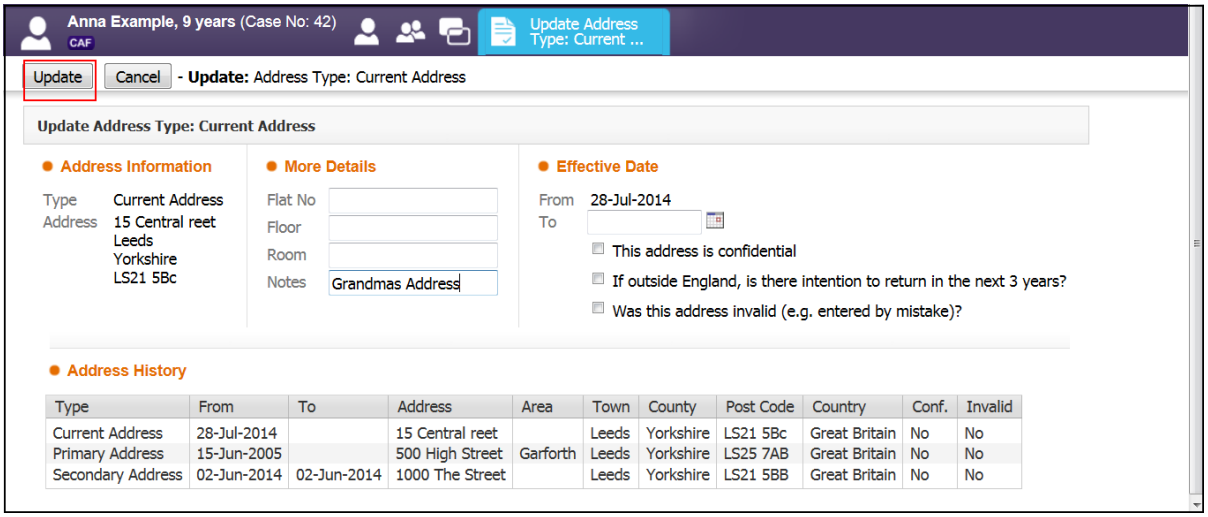
2. **Select the address** that you want to update from the Address History (bottom of screen). The selected address will be displayed in the address information section (on the left)

3. **Select Update this Address**


Liquidlogic ECAF
Home Help Menu System Find New Worker1 (1)
Anna Example, 9 years (Case No: 42)
CAF
Address Type: Current Address
Address Type: Current Address
Address Information
Type Current Address
Address 15 Central reet Leeds Yorkshire LS21 5Bc
Effective Date
From 28-Jul-2014
To
Was this address invalid (e.g. entered by mistake)?
This address is confidential
If outside England, is there intention to return in the next 3 years?
Update this Address...
Add New Address
Address History
Type From To Address Area Town County Post Code Country Conf. Invalid
Current Address 28-Jul-2014 15 Central reet Leeds Yorkshire LS21 5Bc Great Britain No No
Primary Address 15-Jun-2005 500 High Street Garforth Leeds Yorkshire LS25 7AB Great Britain No No
Secondary Address 02-Jun-2014 02-Jun-2014 1000 The Street Leeds Yorkshire LS21 5BB Great Britain No No

4. Enter the required information into the **More Details** section. If the address needs to be marked as confidential select the **This Address is Confidential** check box. If the address is incorrect or entered by mistake mark the **Was this address invalid?** check box. If the address is outside England and their intention to return in the next 3 years mark the **If outside England, is their intention to return in the next 3 years?** check box.

5. Click **Update**

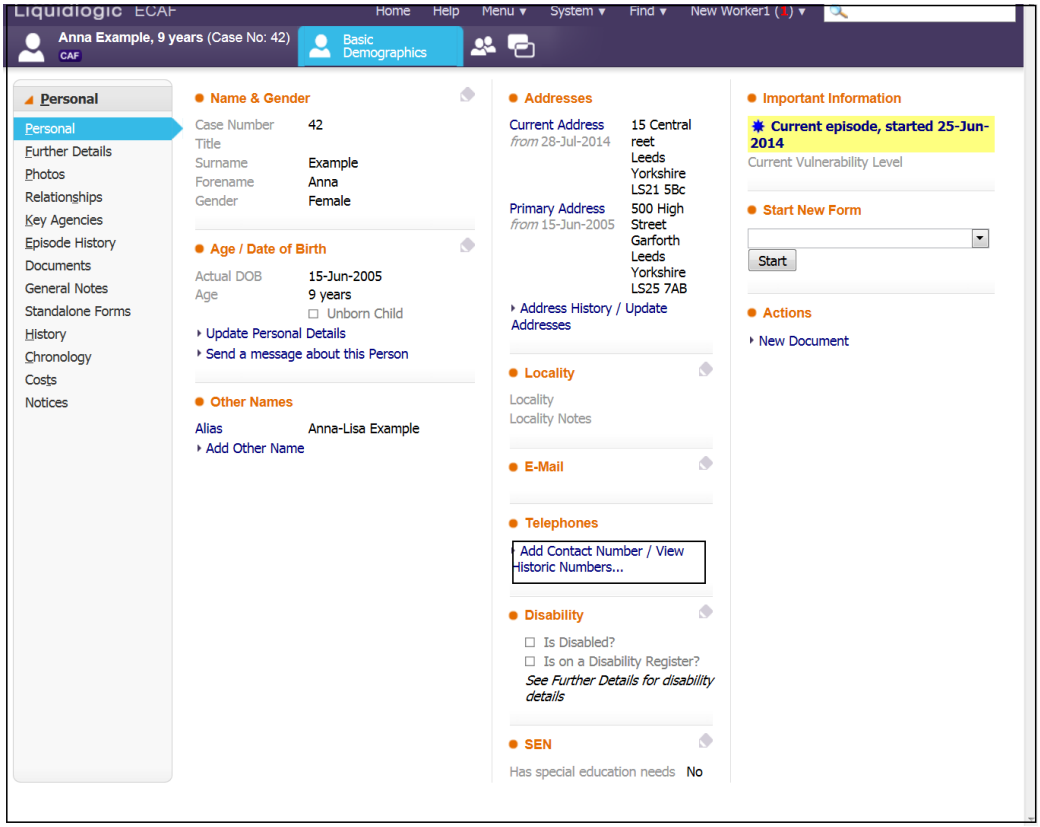

Anna Example, 9 years (Case No: 42)
CAF
Update Address
Type: Current ...
Update
Cancel
- Update: Address Type: Current Address
Update Address Type: Current Address
Address Information
Type Current Address
Address 15 Central reet
Leeds
Yorkshire
LS21 5Bc
More Details
Flat No
Floor
Room
Notes Grandmas Address
Effective Date
From 28-Jul-2014
To
This address is confidential
If outside England, is there intention to return in the next 3 years?
Was this address invalid (e.g. entered by mistake)?
Address History
Type From To Address Area Town County Post Code Country Conf. Invalid
Current Address 28-Jul-2014 15 Central reet Leeds Yorkshire LS21 5Bc Great Britain No No
Primary Address 15-Jun-2005 500 High Street Garforth Leeds Yorkshire LS25 7AB Great Britain No No
Secondary Address 02-Jun-2014 02-Jun-2014 1000 The Street Leeds Yorkshire LS21 5BB Great Britain No No

NOTE: Addresses can be added or updated but cannot be deleted. Please refer to your System Administrator for further guidance.

Contact Telephone Numbers

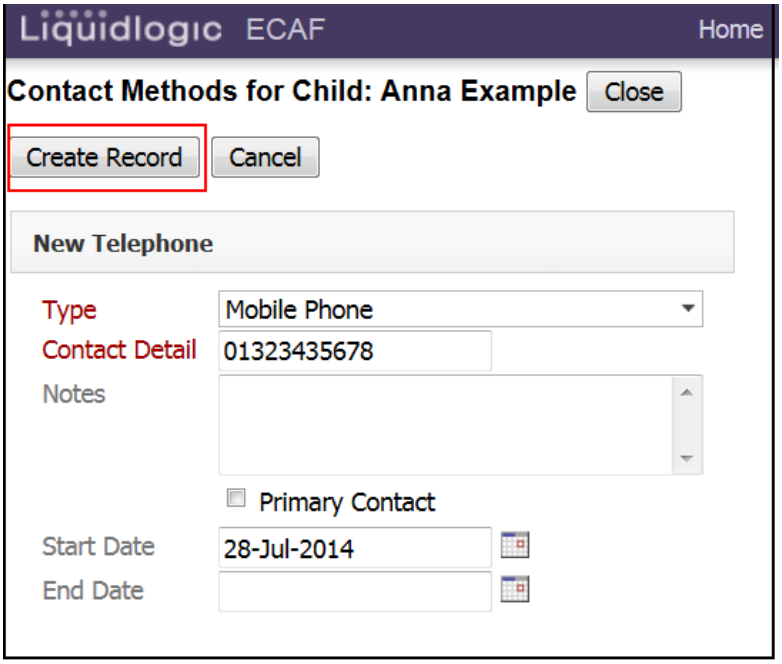
Adding a Contact Telephone Number

1. Click **Add Contact Number/View Historic Numbers** from the Telephones section of the Personal tab

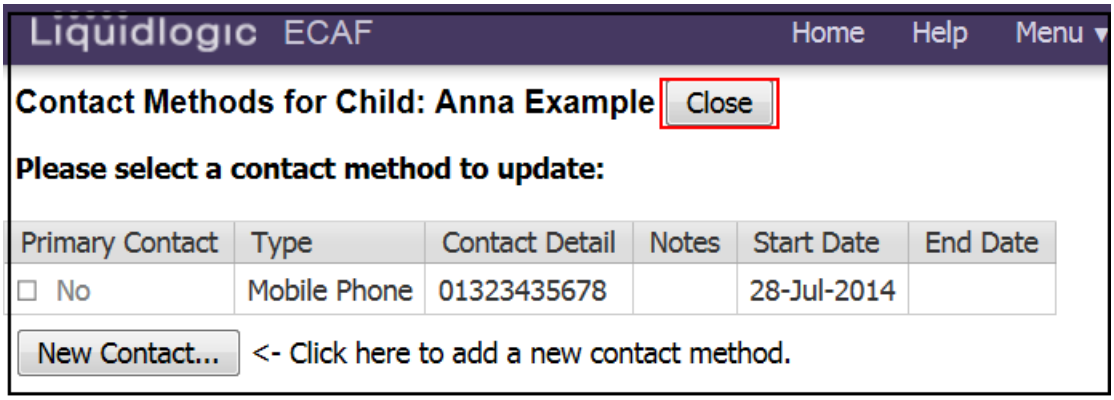


TIP: if a telephone number has previously been entered, this link will change to **View/Update Contact Number Details**

2. Choose the **Telephone Type** from the drop-down selection
3. Enter the **Contact Telephone Number**
4. Enter any relevant **Notes**
5. Select the **Primary Contact** checkbox if this is the main contact telephone number
6. The **Start Date** will automatically default to today's date but can be amended if required
7. Click **Create Record**



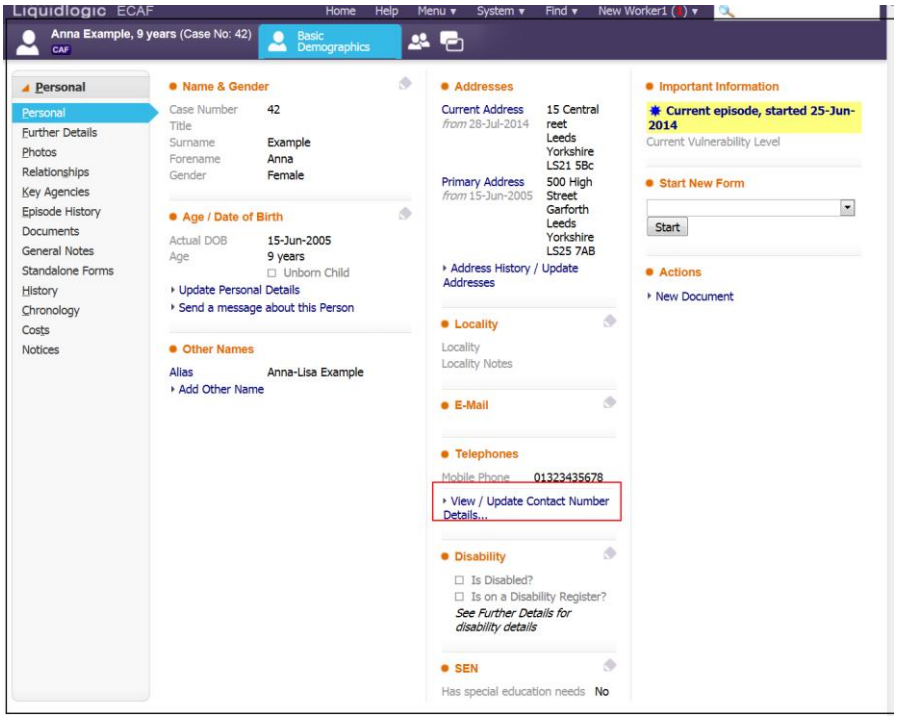
8. Click **Close** to the return to the child's demographics



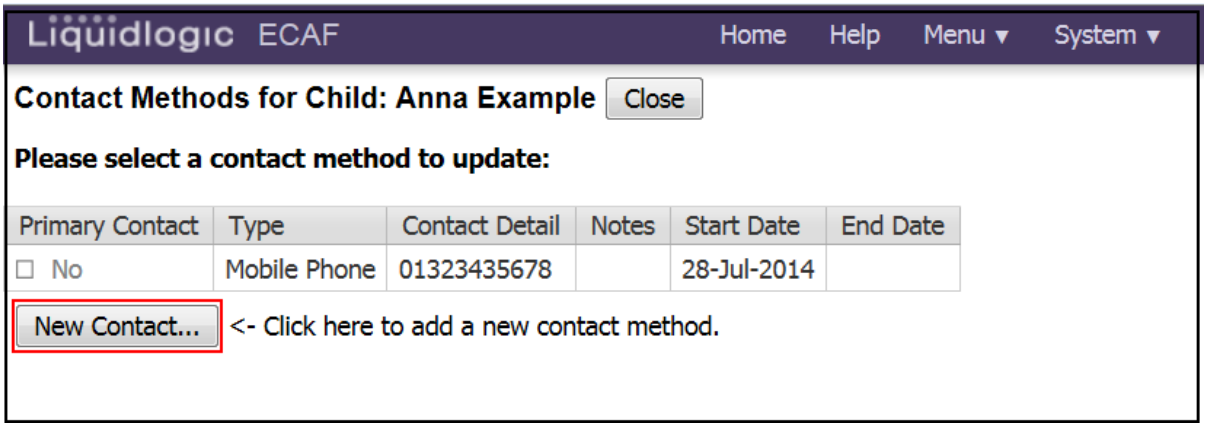
Adding Additional Contact Telephone Numbers

Any recorded contact telephone numbers will be displayed in the Personal tab. The Primary Telephone Number will be in bold.

1. Click **Update Contact Numbers** from the Telephones section of the Personal tab

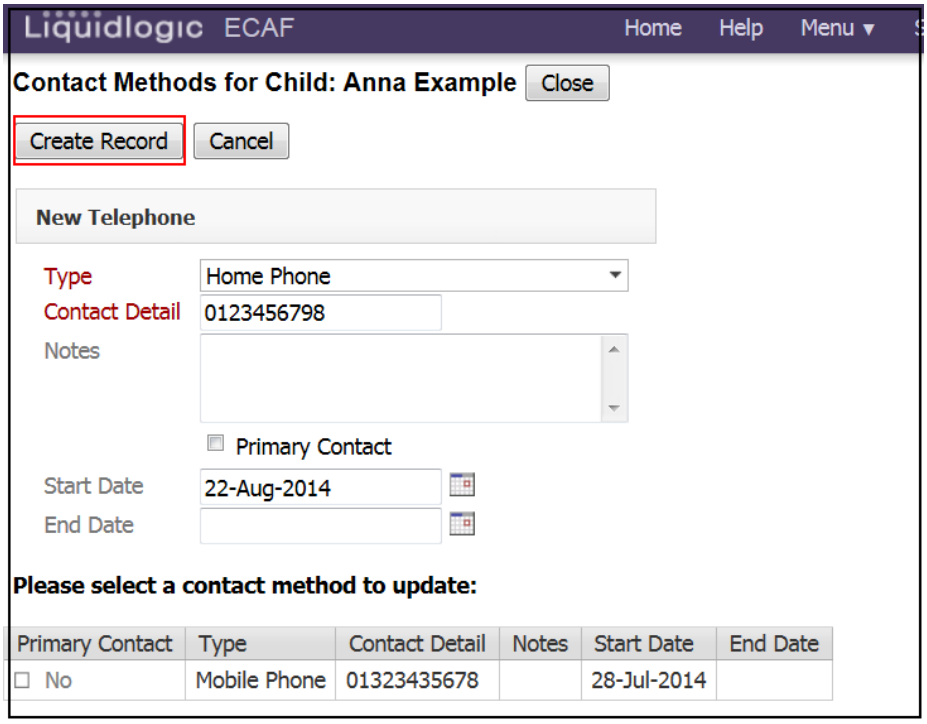


2. Click **New Number**

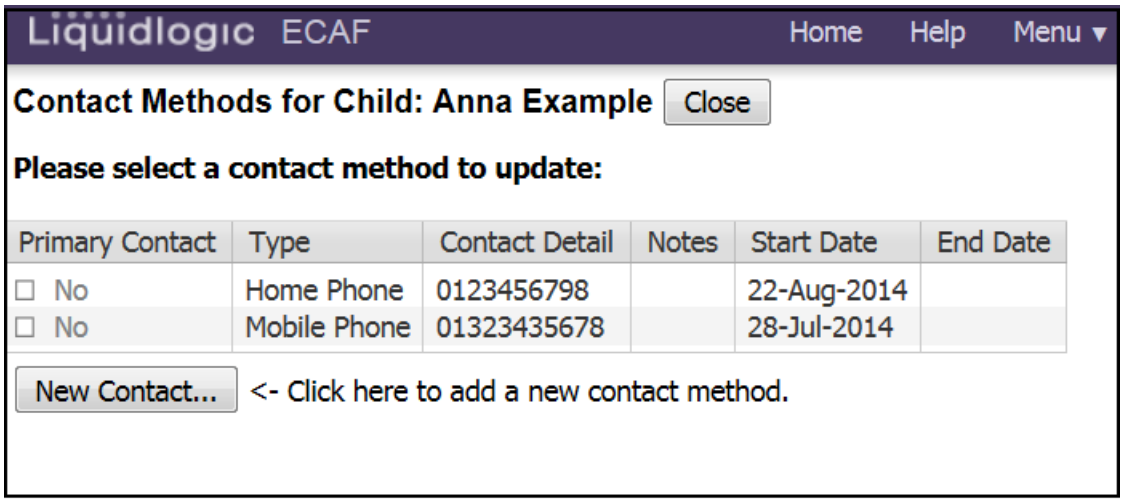


3. Enter the details for the new Telephone Number

4. Click **Create Record**



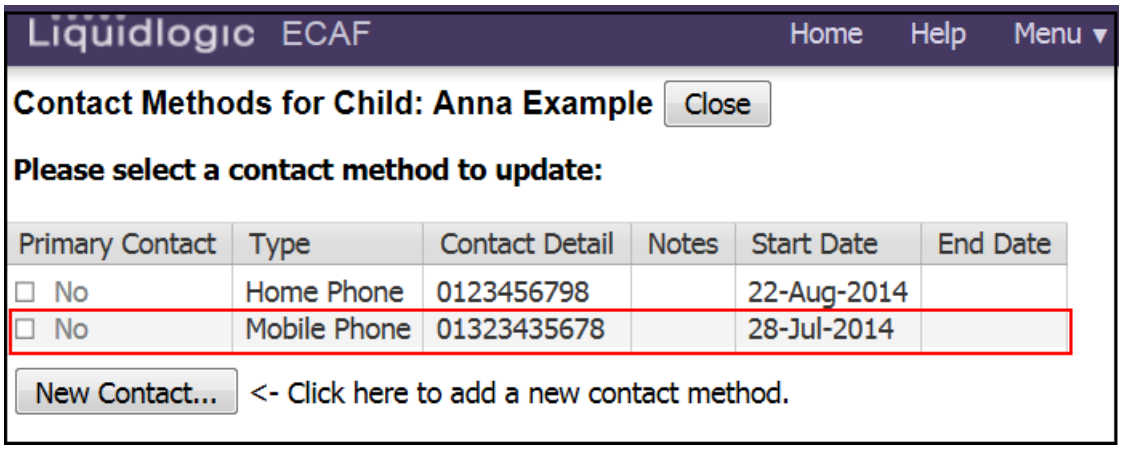
Any recorded telephone numbers will be listed:



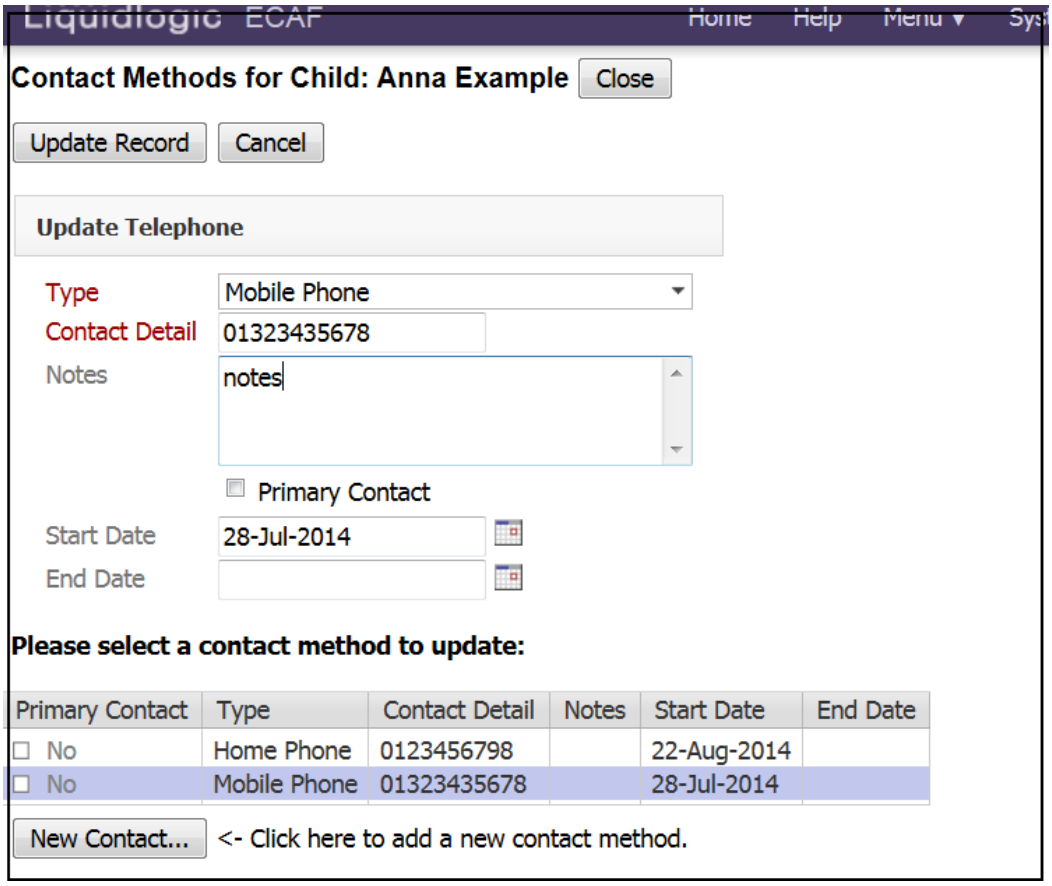
Updating Contact Telephone Numbers

1. Click **Update Contact Numbers** from the Telephones section of the Personal tab

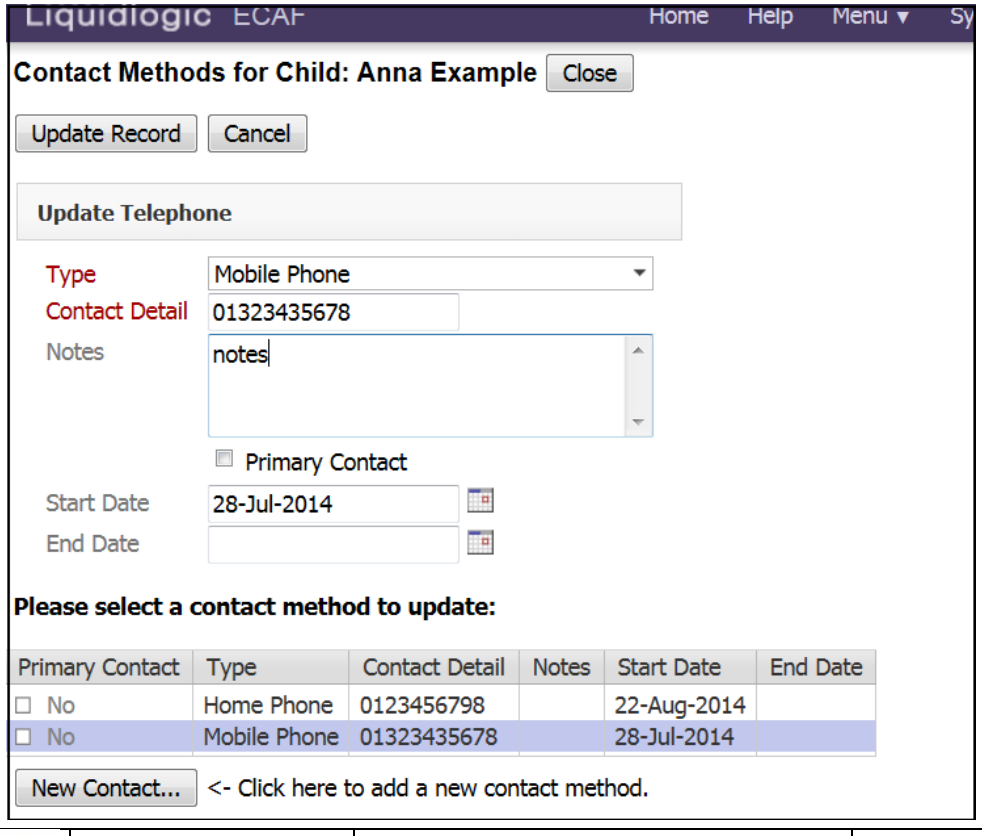
3. Click on the Telephone Number you wish to update



4. Make the required changes and then click **Update Record**



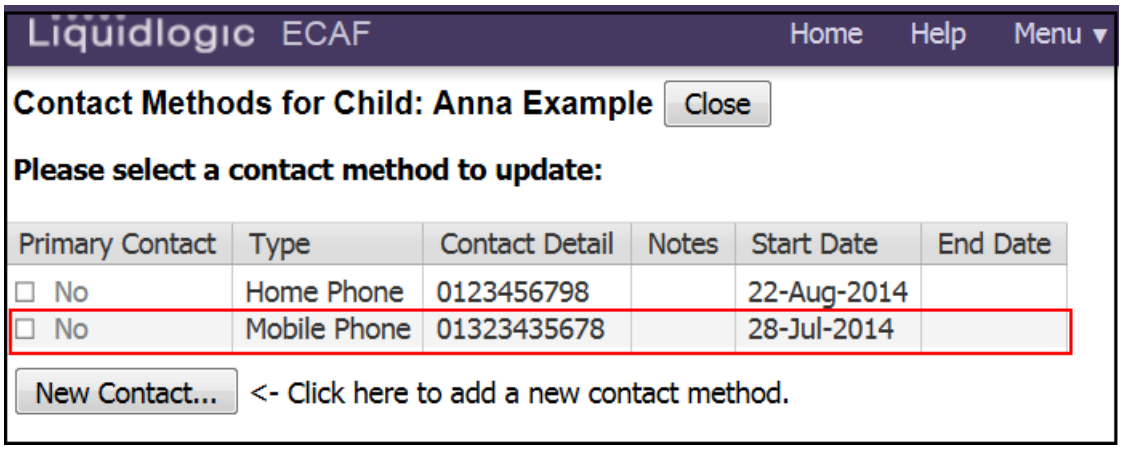
5. Click **Close** to the return to the child's demographics



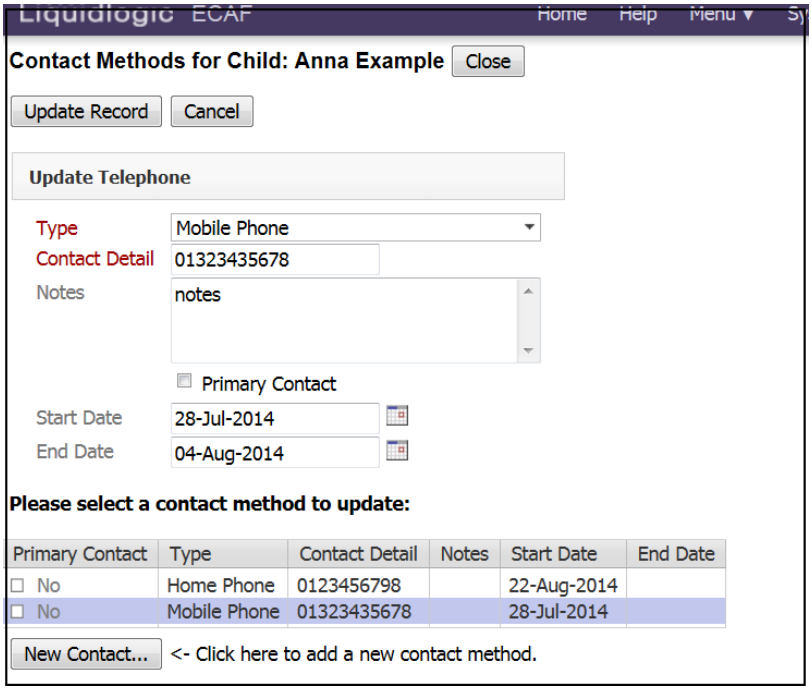
Removing a Contact Telephone Number

1. Click **Update Contact Numbers** from the Telephones section of the Personal tab

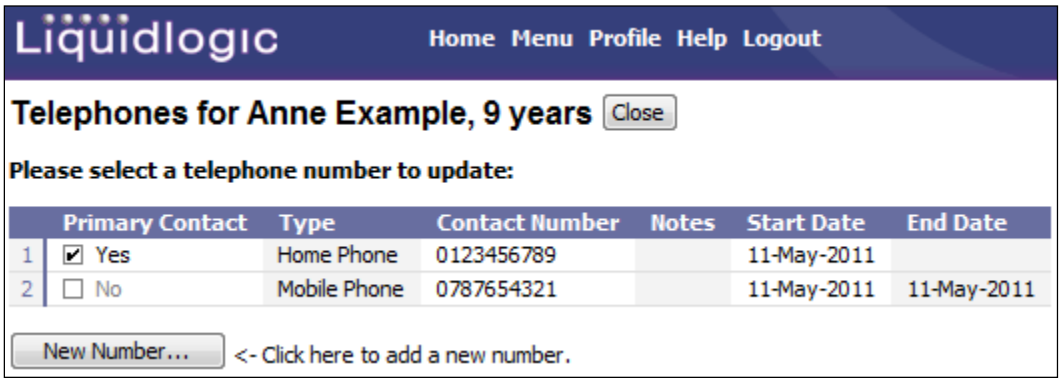
2. Click on the Telephone Number you wish to remove



3. Enter an **End Date** and then click **Update Record**



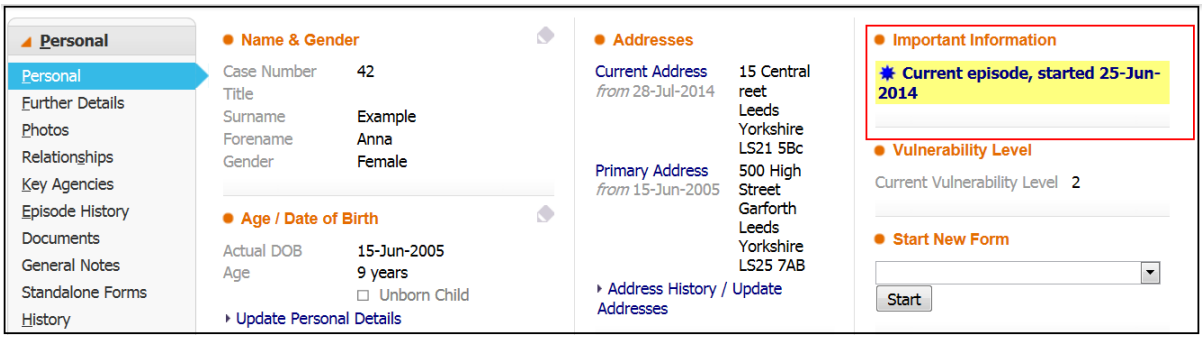
The number will remain in the list of telephone numbers but will not be visible in the Personal tab.

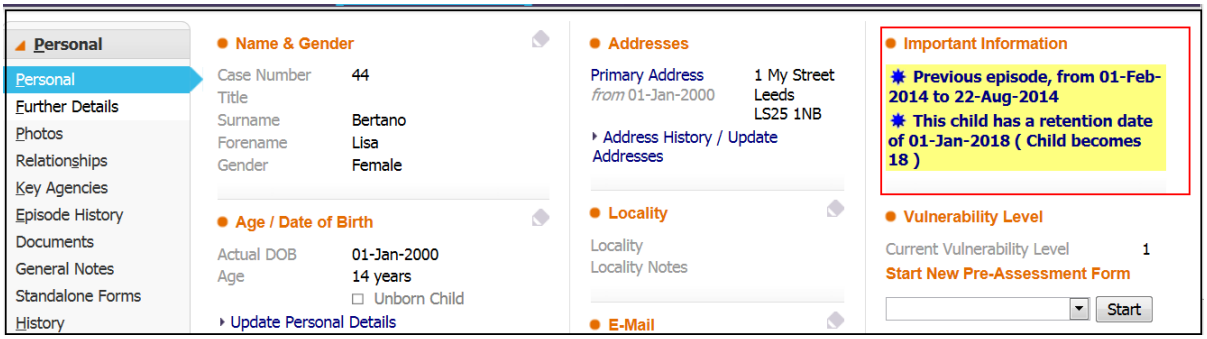


Important Information

The **Important Information** section of the **Personal** tab will display any alerts of important information that are recorded against the child.

For example, information that you will be alerted about may include Current and Previous Episodes.



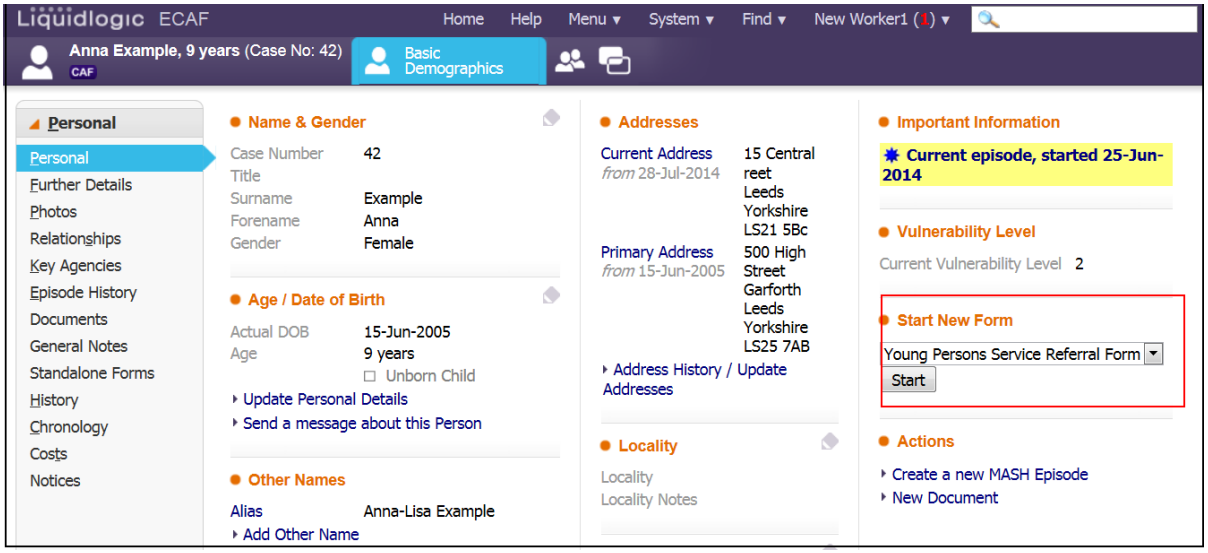


Starting a new Standalone Form

A Standalone form can be created for a child/young person provided they do not have a current episode.

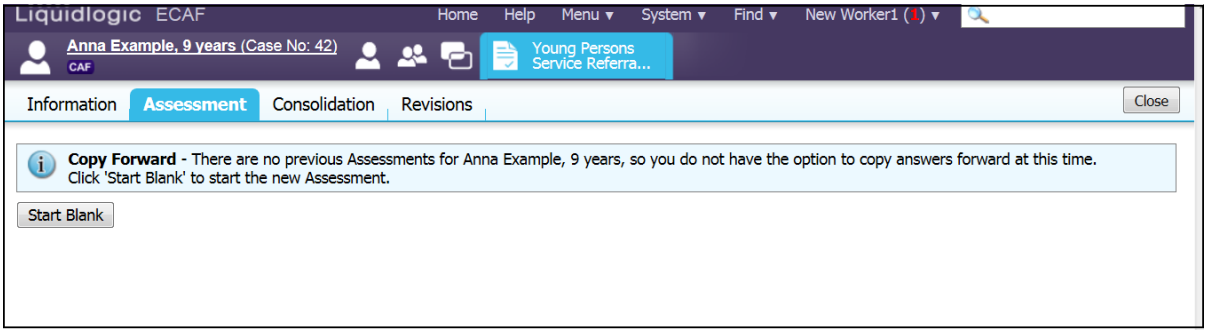
1. From the Personal tab of the Demographics, select the relevant form from the **Start New Form** picklist

2. Click **Start**

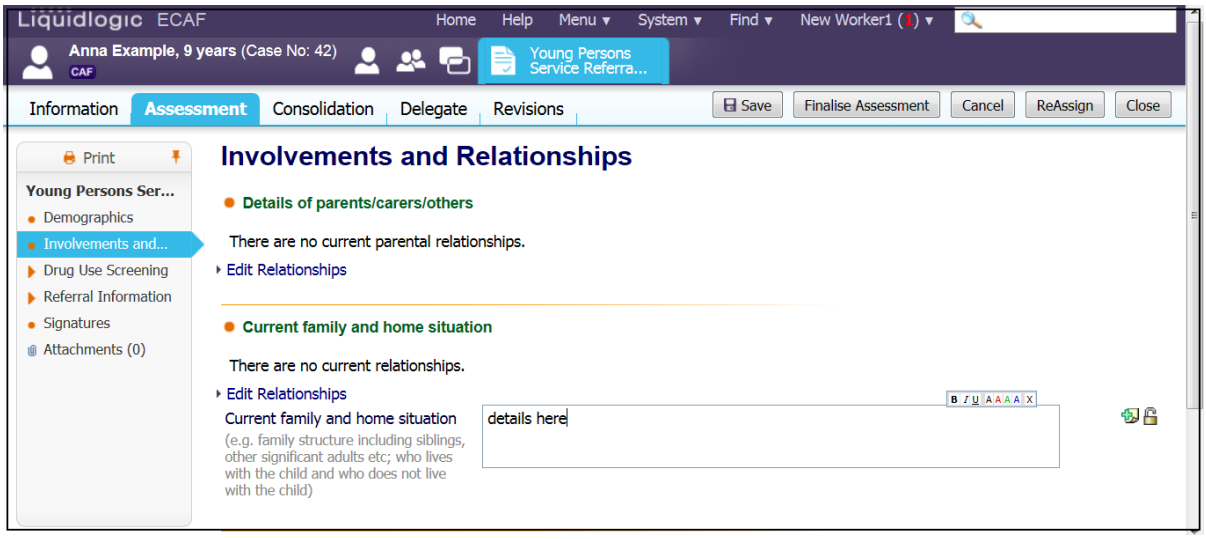


3. Click **Start Blank** to create a blank Standalone or select previously completed Standalones and then select the **Copy Forward** button

NOTE: A Standalone form can be created as many times as required.

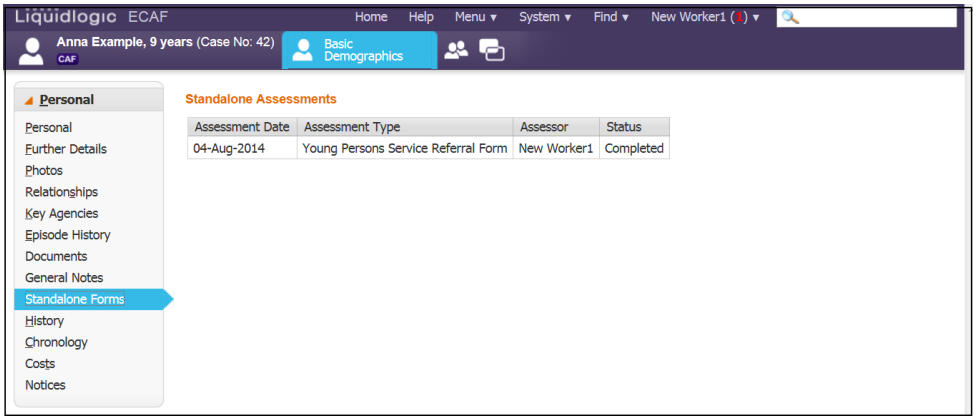


4. Complete the Standalone as required and click **Finalise** Checklist and then click **OK**



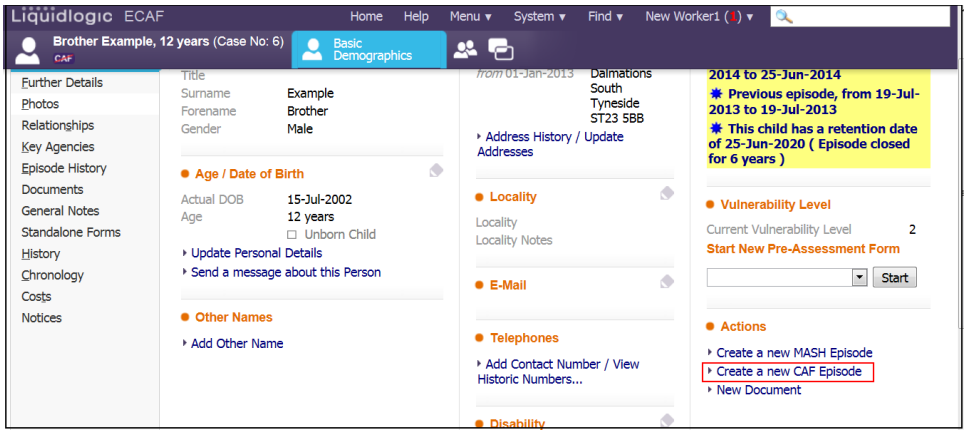
A list of previously completed Standalones can be found on the **Standalone Forms** tab in the Demographics, see example below:

NOTE: The Standalone Forms tab will only be displayed if the Standalone Checklist has been completed.



New Episode

A new episode can be started from the personal tab on the child demographics record. If a current CAF episode exists this will be indicated on the **Important Information** section of the personal tab and the New Episode link will be unavailable.

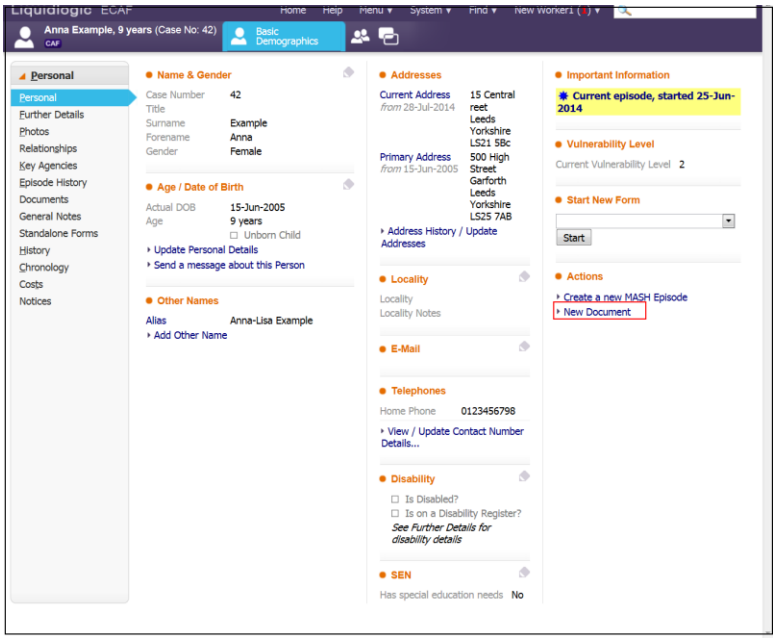


If a current episode exists the option to create a **New Episode** will not appear on the child's demographics.

NOTE: Please refer to the **Episode** manual for further information.

New Documents

The action to create a **New Document** will only appear if the child/young person has a current episode.



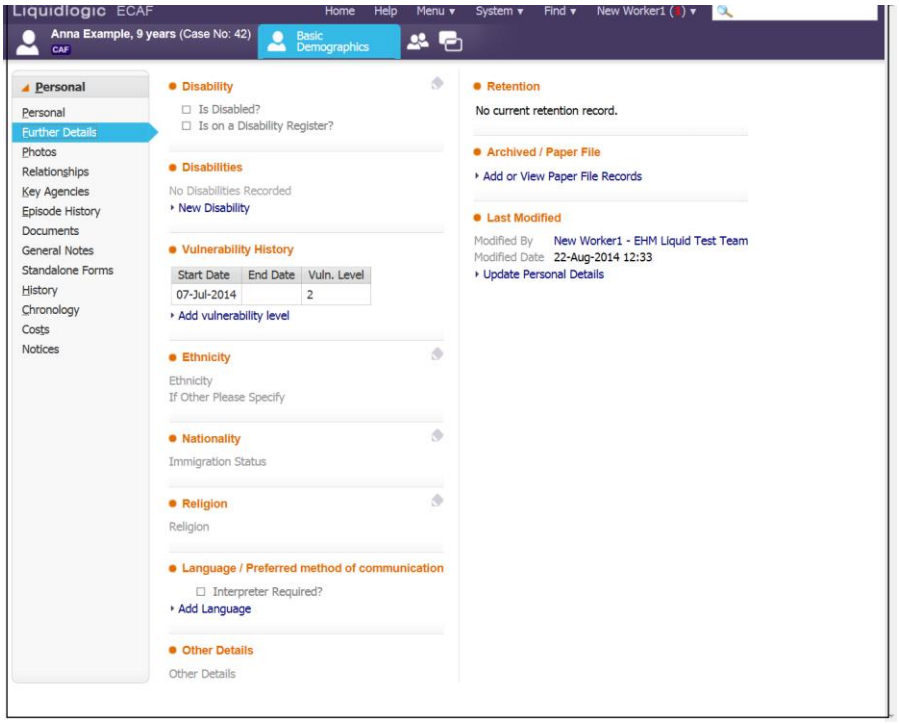
The Document Editor allows users to create and open documents 'in-place' within PROTOCOL applications. System Administrators can add new document templates quickly and easily and users

will be able to open new documents, edit them where necessary and save them against a person's record. Users will also be able to set security against these documents.

For further guidance on creating a new document please refer to the **Document Editor** Manual.

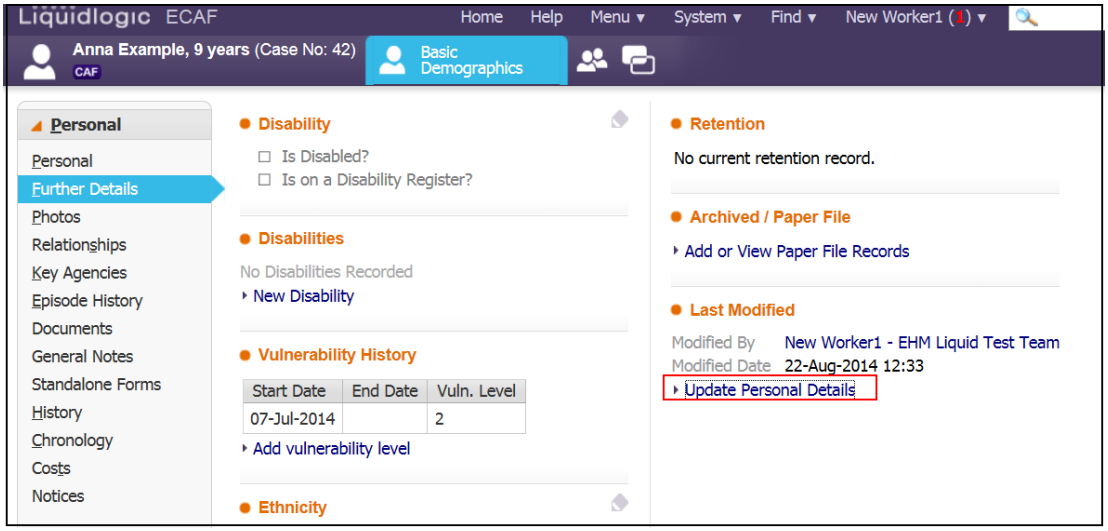
Further Details

The **Further Details** tab contains sections of further information relating to the child's vulnerability history as well as retention and archived paper file details. The 'Last Modified' section displays when and by whom this record has last been updated.



Updating Further Details

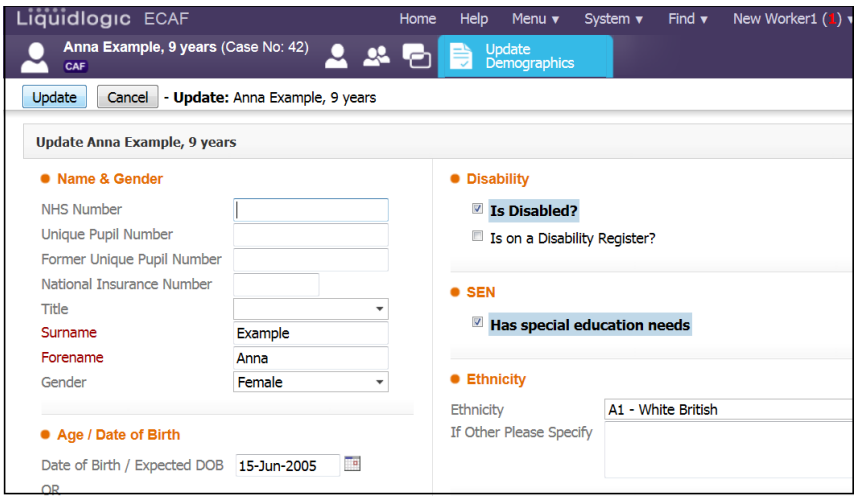
1. Click **Update Personal Details** from the Further Details tab (or click Update Personal Details from the Personal tab)



The screen will default to updating the main demographics (which includes fields held on the Personal and Further Details tab).

2. Specify the **Ethnicity**, **Immigration Status**, **Religion**, **Interpreter Required** and/or any **Other Details**
3. After entering the further information, click **Update**

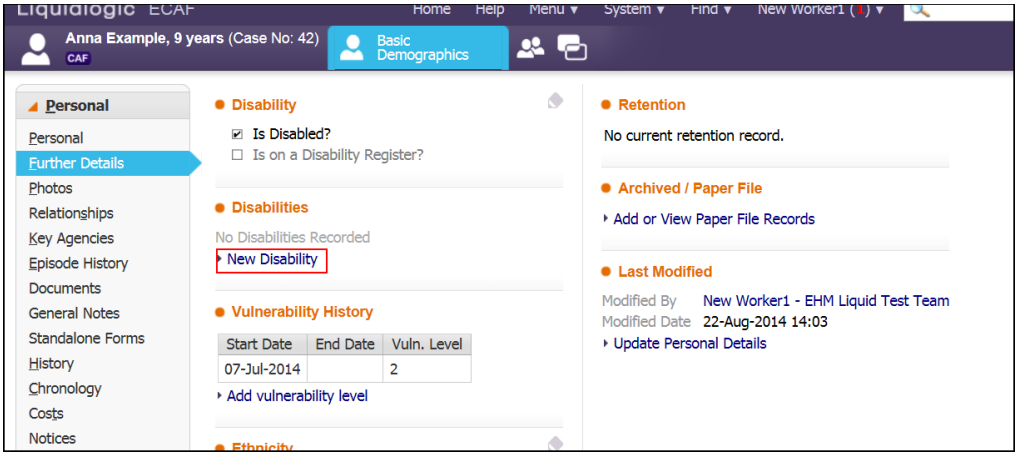
NOTE Please see the **Adding a Disability** section in this user manual for guidance on recording disabilities.



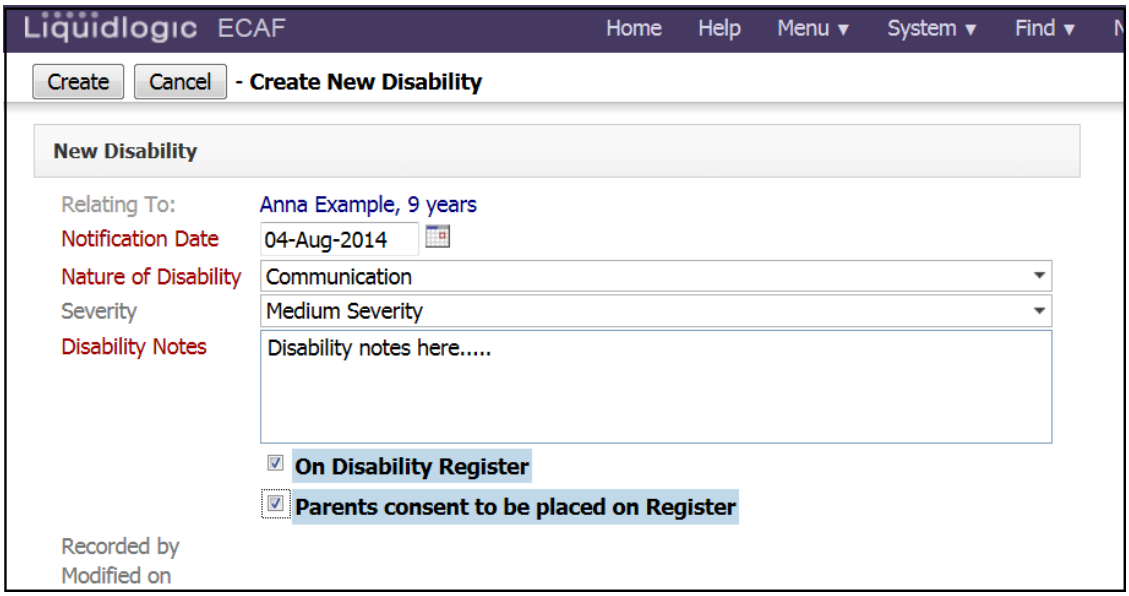
Adding a Disability

Disabilities can be recorded, updated, viewed and deleted from the Further Details tab.

1. Click on the link **New Disability** from the **Further Details** tab

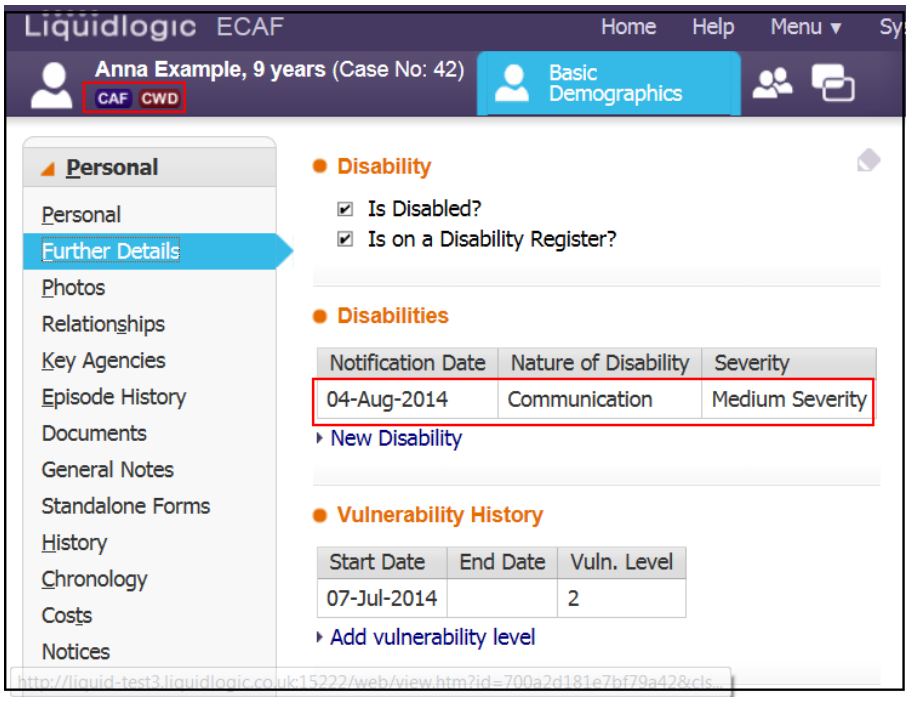


2. Enter the **Notification Date**
3. Select a **Nature of Disability** from the list
4. Enter a **Severity**
5. Enter any **Disability Notes** and then click **Create**



NOTE: Only one disability can be entered at a time. Repeat the above steps to add further disabilities.

The **Further Details** tab will updated to reflect this. A child with disabilities icon will also be generated next to the child's name. Please note that if this CWD icon does not appear, then please check your System Configuration maintenance settings under (see System admin manual for further details)

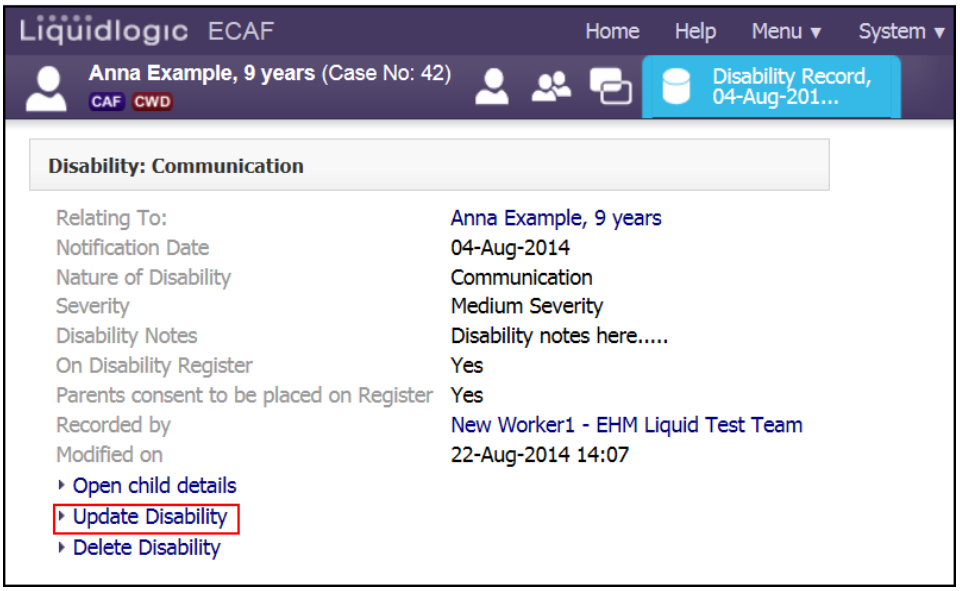


NOTE: Only one disability can be entered at a time. Repeat the above steps to add further disabilities.

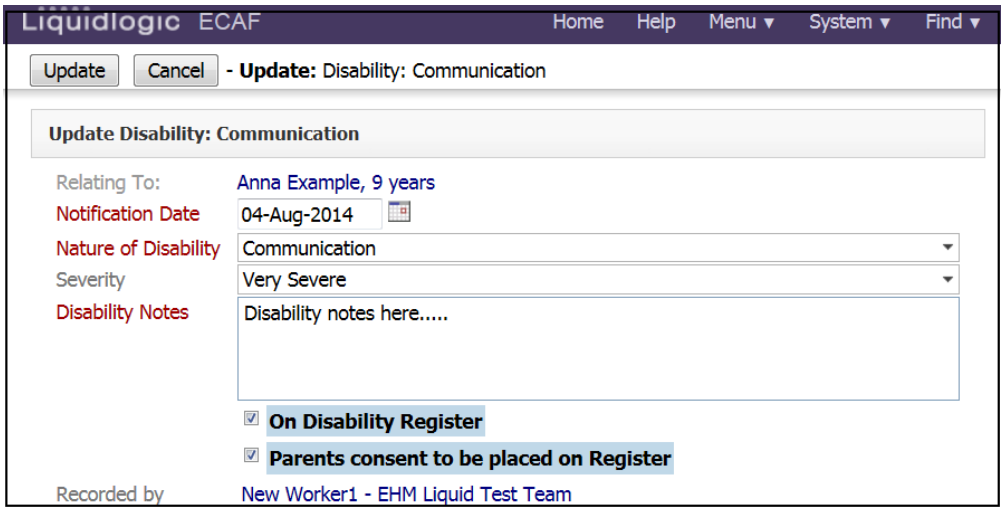
Updating a Disability

1. From the **Further Details** tab, click on the **disability** that requires updating

2. More detailed information will be displayed. Click **Update Disability**

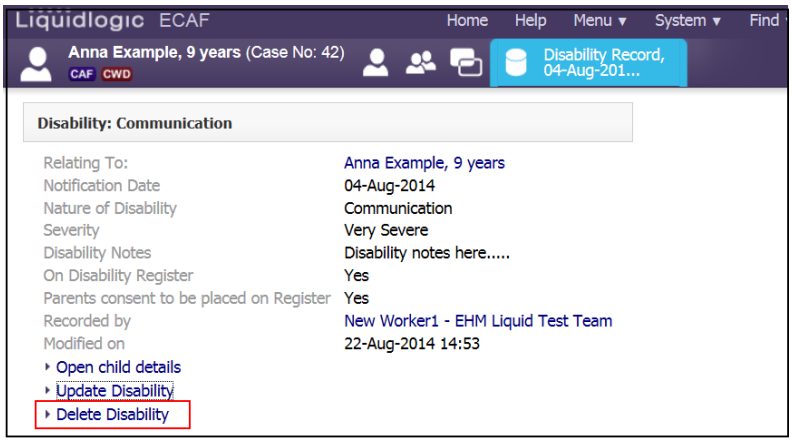


2. Enter the updated information and click **Update**

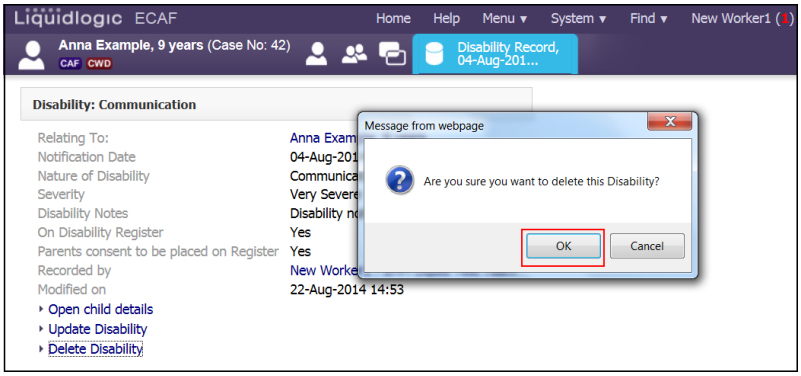

Liquidlogic ECAF
Home Help Menu ▾ System ▾ Find ▾
Update Cancel - Update: Disability: Communication
Update Disability: Communication
Relating To: Anna Example, 9 years
Notification Date 04-Aug-2014
Nature of Disability Communication
Severity Very Severe
Disability Notes Disability notes here.....
On Disability Register
Parents consent to be placed on Register
Recorded by New Worker1 - EHM Liquid Test Team

Deleting a Disability

1. From the **Further Details** tab, click on the disability you wish to delete
2. More detailed information will be displayed. Click **Delete Disability**

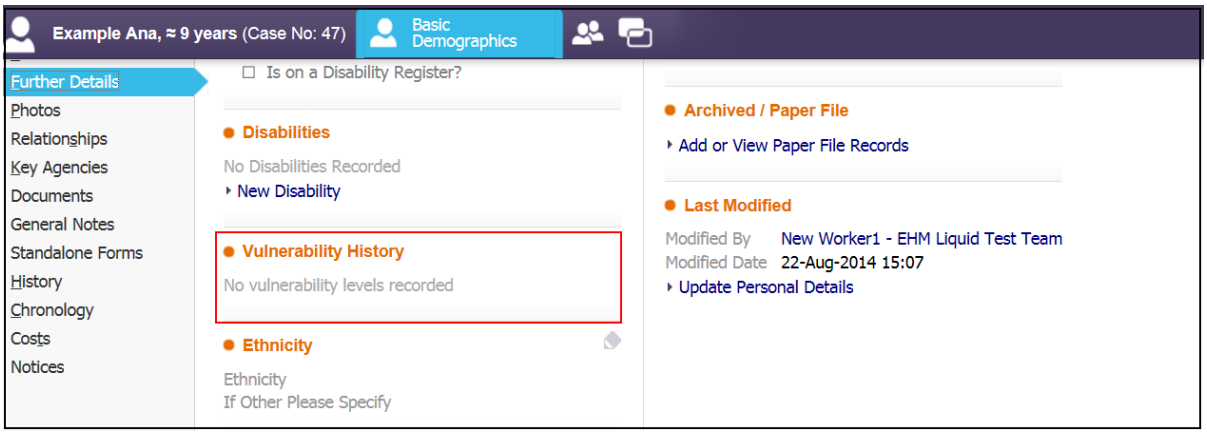

Liquidlogic ECAF
Home Help Menu ▾ System ▾ Find
Anna Example, 9 years (Case No: 42)
CAF CWD
Disability Record, 04-Aug-201...
Disability: Communication
Relating To: Anna Example, 9 years
Notification Date 04-Aug-2014
Nature of Disability Communication
Severity Very Severe
Disability Notes Disability notes here.....
On Disability Register Yes
Parents consent to be placed on Register Yes
Recorded by New Worker1 - EHM Liquid Test Team
Modified on 22-Aug-2014 14:53
Open child details
Update Disability
Delete Disability

3. Click **OK** to confirm. The Further Details tab will be displayed with the deleted disability removed



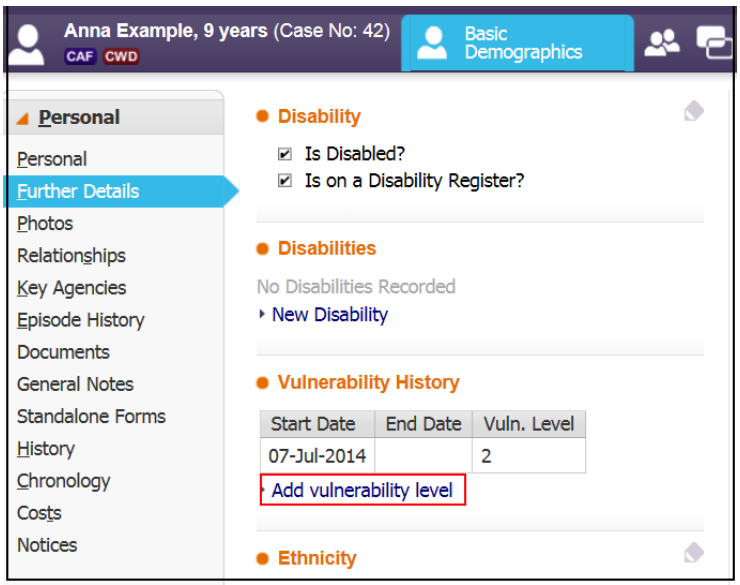
Vulnerability History

The Vulnerability Level can be added when starting a new episode. Once this has been created it can be updated from the Further Details tab in order to track the child's vulnerability throughout their CAF episode.

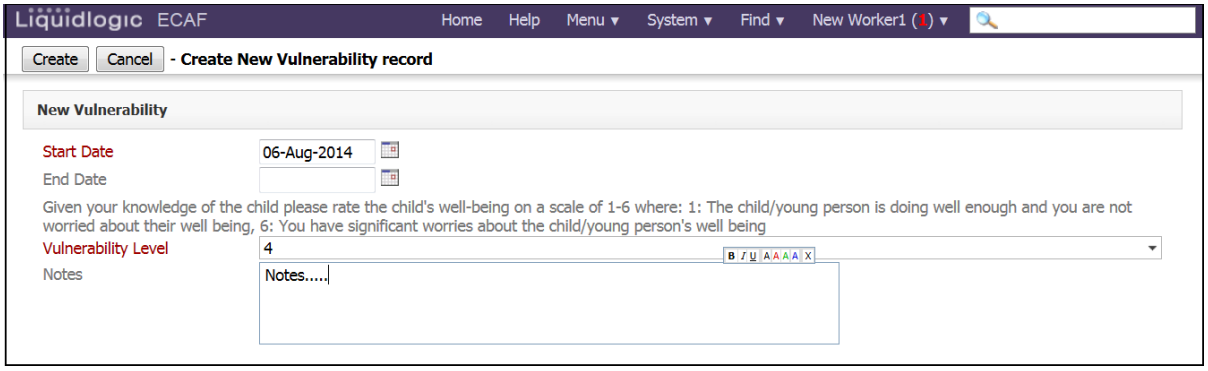


Updating the Vulnerability Level

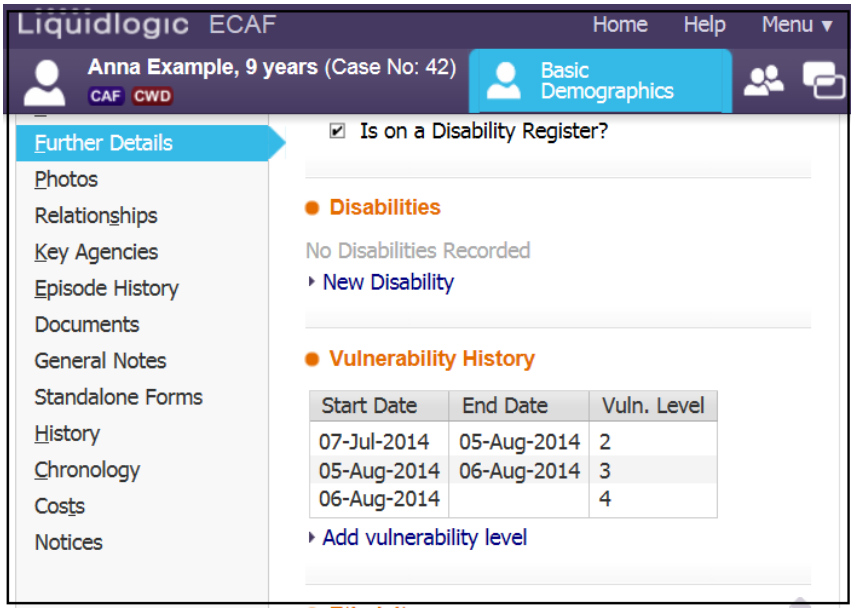
1. From the **Further Details** tab click **Add Vulnerability Level**



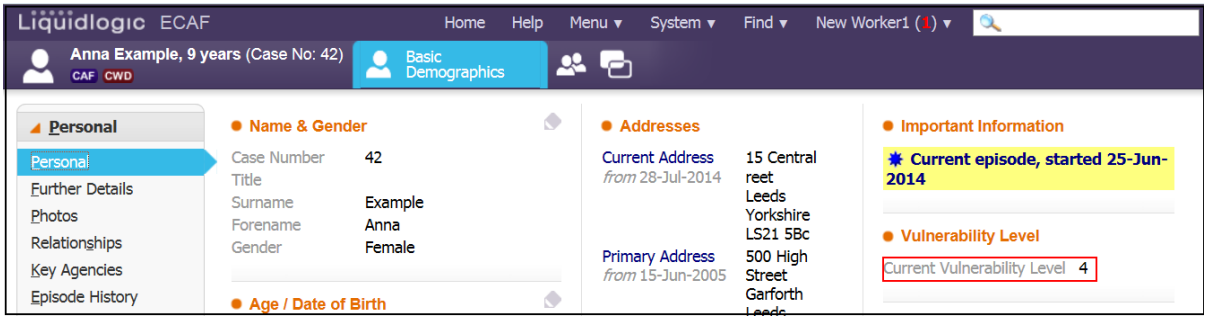
2. Enter a **start** date and select the **Vulnerability** from the picklist
3. Enter notes if required and then click **Create**



The start date of the new vulnerability level will automatically be the end date of the previous vulnerability.

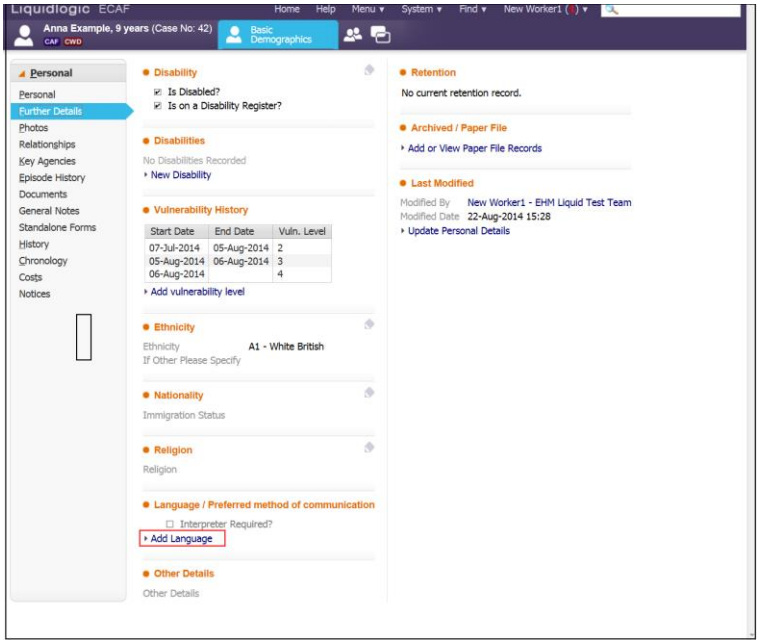


The current Vulnerability level will be displayed in the Personal tab:

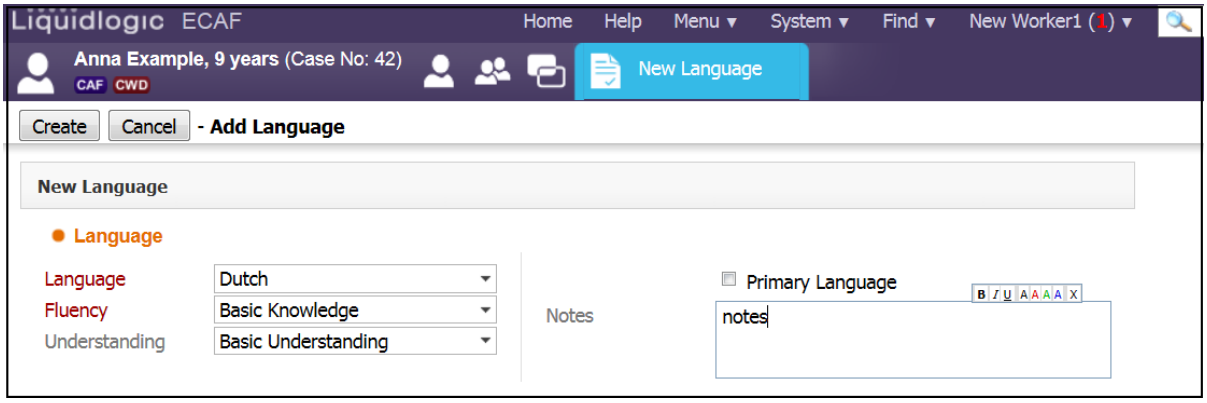


Adding a Language

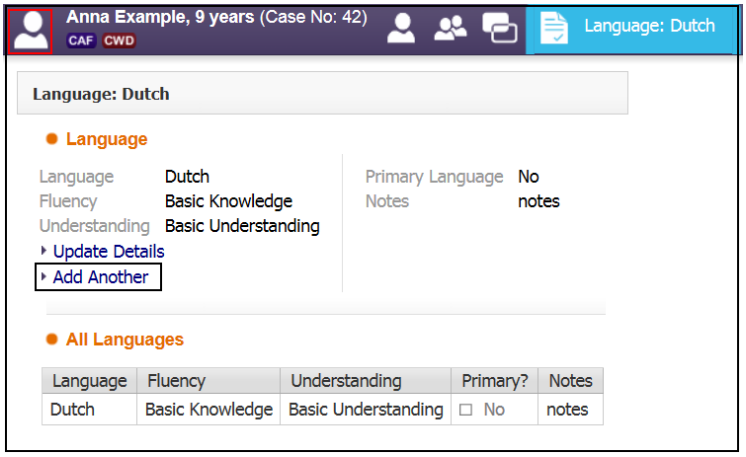
1. From the Further Details tab, click **Add Language**



2. Choose the **Language**, **Fluency** and **Understanding** from the drop-down selection lists
3. Tick the **Primary Language** checkbox, if required
4. Enter any additional **Notes** and then click **Create**

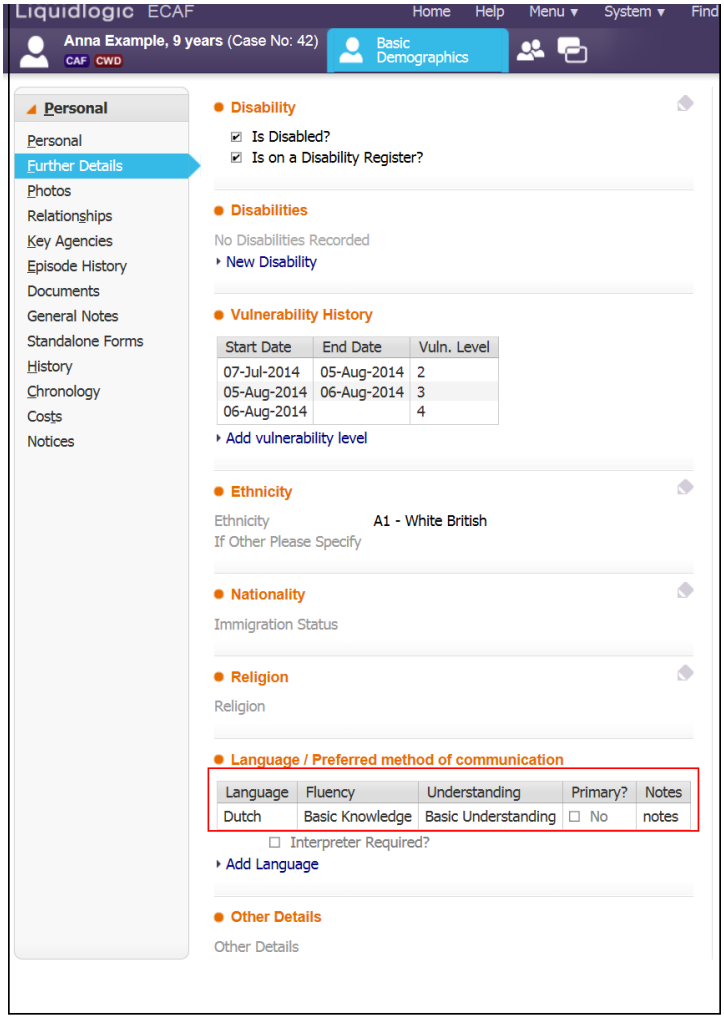


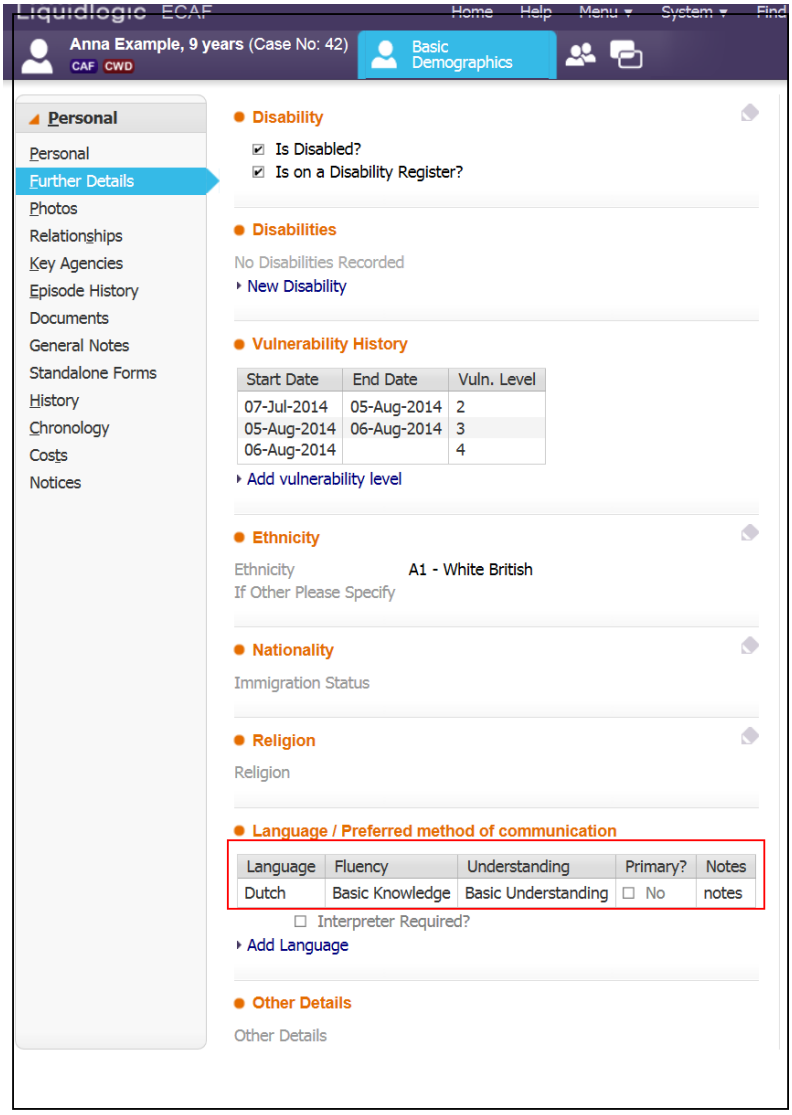
5. Click **Add Another** to continue to add further languages or select the demographics icon to view the Further Details tab on the child's demographics record.



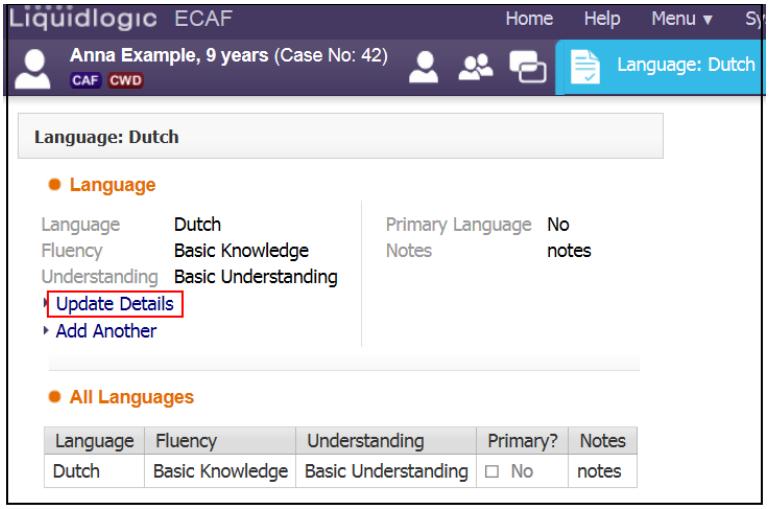
Updating Language Details

1. From the Further Details tab, click on the language that requires updating

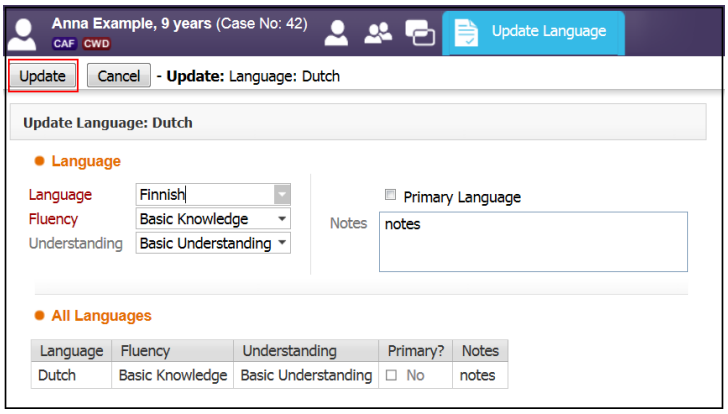

Liquidlogic ECAF
Home
Help
Menu
System
Find
Anna Example, 9 years (Case No: 42)
CAF CWD
Basic Demographics
Personal
Personal
Further Details
Photos
Relationships
Key Agencies
Episode History
Documents
General Notes
Standalone Forms
History
Chronology
Costs
Notices
Disability
Is Disabled?
Is on a Disability Register?
Disabilities
No Disabilities Recorded
New Disability
Vulnerability History
Start Date
End Date
Vuln. Level
07-Jul-2014
05-Aug-2014
2
05-Aug-2014
06-Aug-2014
3
06-Aug-2014
4
Add vulnerability level
Ethnicity
Ethnicity
A1 - White British
If Other Please Specify
Nationality
Immigration Status
Religion
Religion
Language / Preferred method of communication
Language
Fluency
Understanding
Primary?
Notes
Dutch
Basic Knowledge
Basic Understanding
No
notes
Interpreter Required?
Add Language
Other Details
Other Details



2. Click **Update Details**

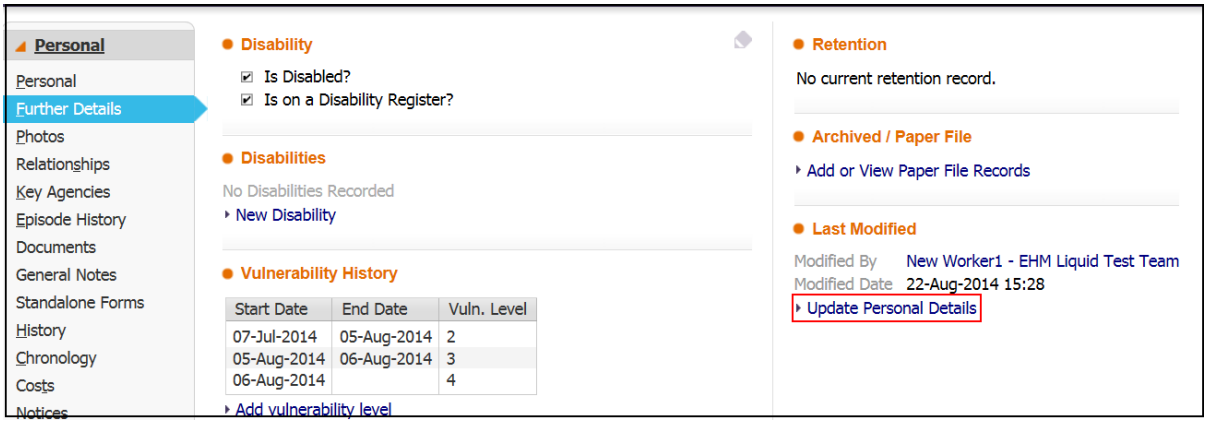


3. Make the required changes, then select **Update**



Recording that an Interpreter is required

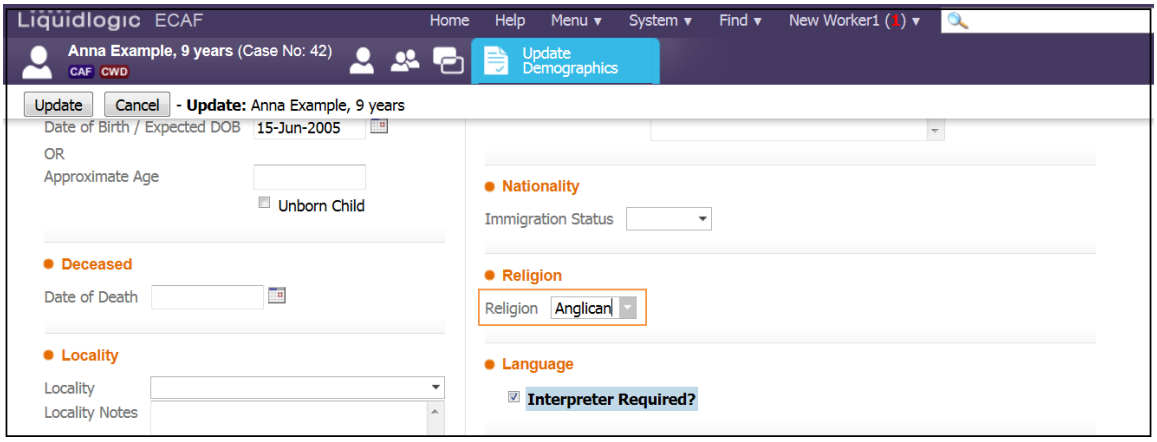
1. From the **Further Details** tab click **Update Personal Details**



2. Click the **Interpreter Required** checkbox, then click **Update**

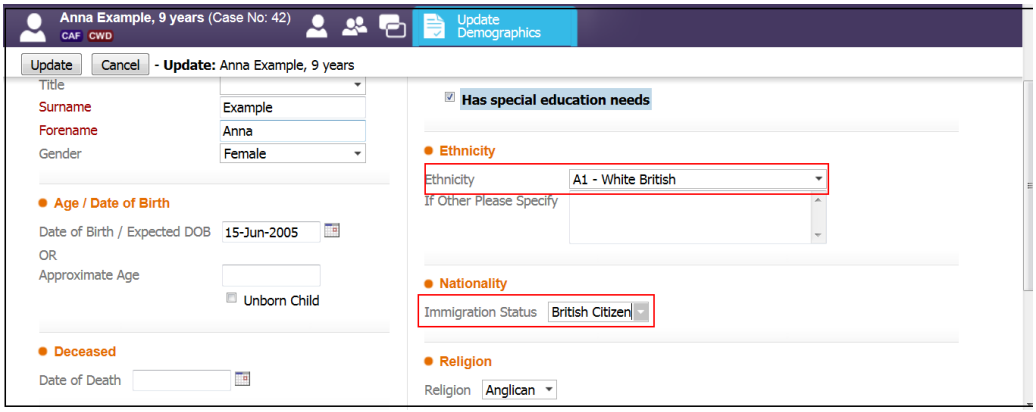
Updating the Religion

1. From the **Further Details** tab click **Update Personal Details**
2. Specify the **Religion** from the drop-down selection
3. Click **Update**



Updating the Ethnicity and Immigration Status

1. From the **Further Details** tab click **Update Personal Details**
2. Choose the **Ethnicity** from the drop-down selection
3. Enter the **Immigration Status** from the drop-down selection
4. Click **Update**

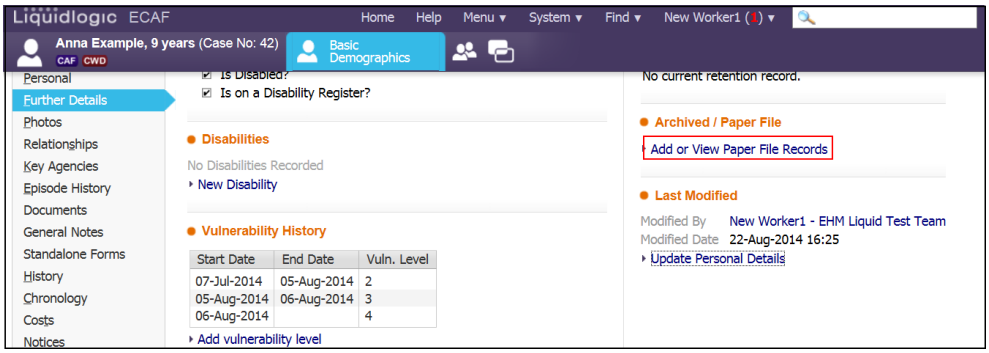


Archived/Paper File

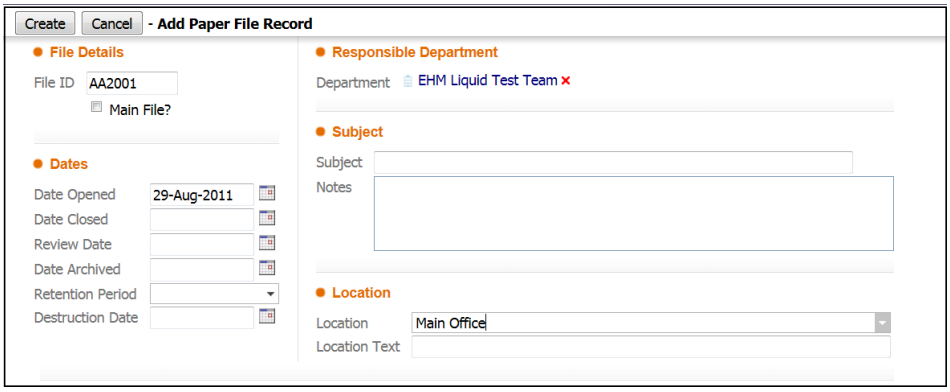
The **Archived/Paper File** section of the **Further Details** tab can hold information on the physical location of any paper files held for this child.

Adding a Paper File Record

1. Click **Add or View Paper File Records** to record information about a paper file

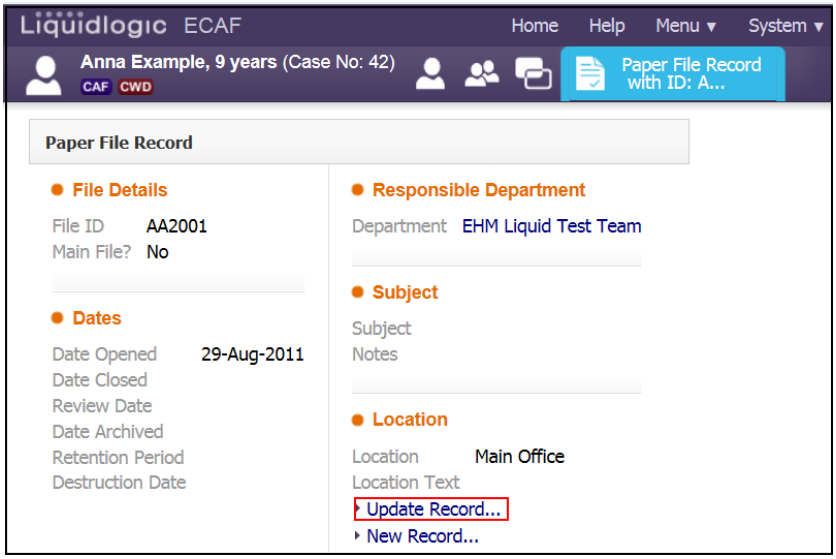


2. Enter the relevant information into the fields provided
3. Click the link **Click here to select a user** to select from the Address Book who is responsible for the document(s). Please see the section on My Contacts in the General user manual for further information if needed
4. Click **Create** to add a paper file record



Updating Archived/Paper File Records

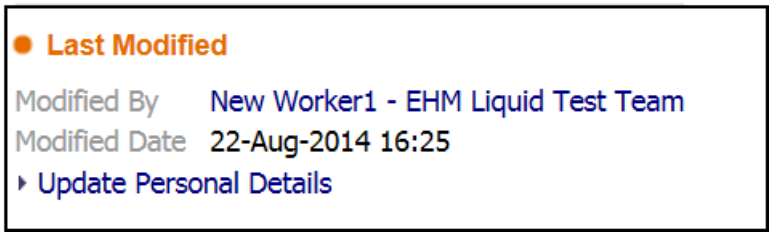
1. From the Further Details tab, select **Add or View Paper File Records**
2. Select the record and click **Update Record**



3. Make the necessary changes, and then click **Update**
4. Click the demographics icon to return to the child's demographics record

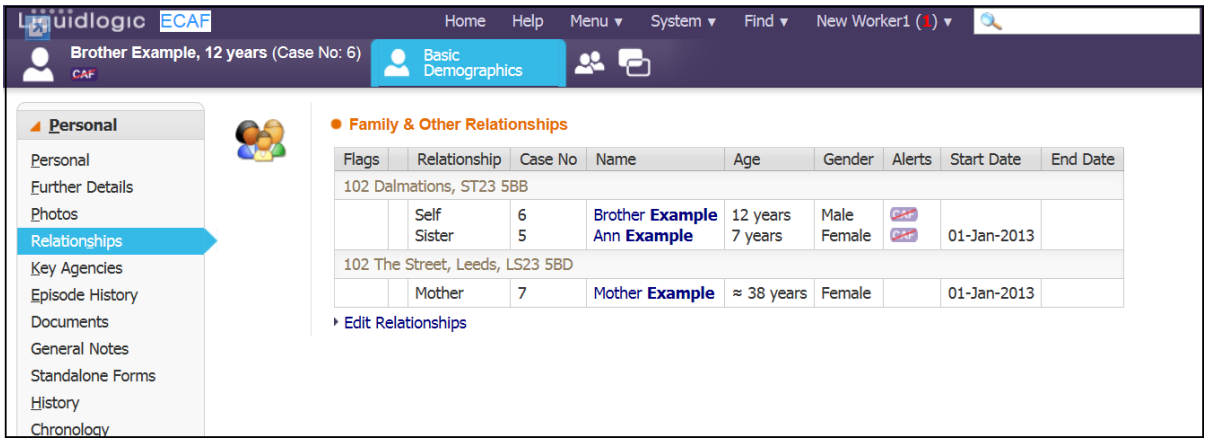
Modification Information

Under the **Last Modified** section there will be some audit information detailing when the child's personal information has been updated.

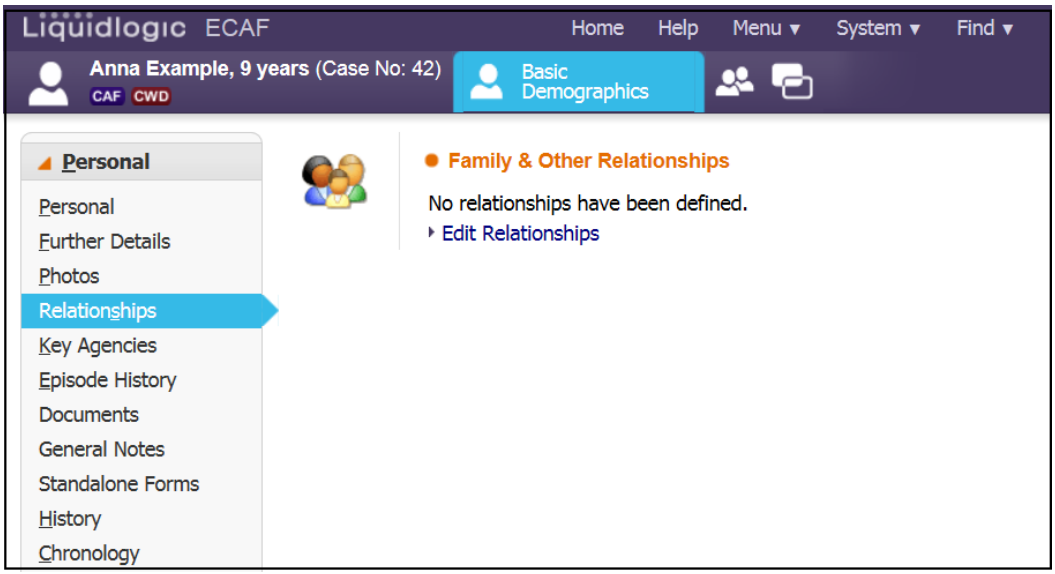


Relationships

The Relationships tab is where a child/young person record can be linked to other people on the system and the relationships specified.


Liquidlogic ECAF
Home Help Menu ▾ System ▾ Find ▾ New Worker1 (1) ▾
Brother Example, 12 years (Case No: 6)
CAF
Basic Demographics
Personal
Personal
Further Details
Photos
Relationships
Key Agencies
Episode History
Documents
General Notes
Standalone Forms
History
Chronology
Family & Other Relationships
Flags | Relationship | Case No | Name | Age | Gender | Alerts | Start Date | End Date
102 Dalmations, ST23 5BB
Self | 6 | Brother Example | 12 years | Male
Sister | 5 | Ann Example | 7 years | Female | 01-Jan-2013
102 The Street, Leeds, LS23 5BD
Mother | 7 | Mother Example | ≈ 38 years | Female | 01-Jan-2013
Edit Relationships

If there are no relationships currently defined for this child the relationships tab will reflect this.



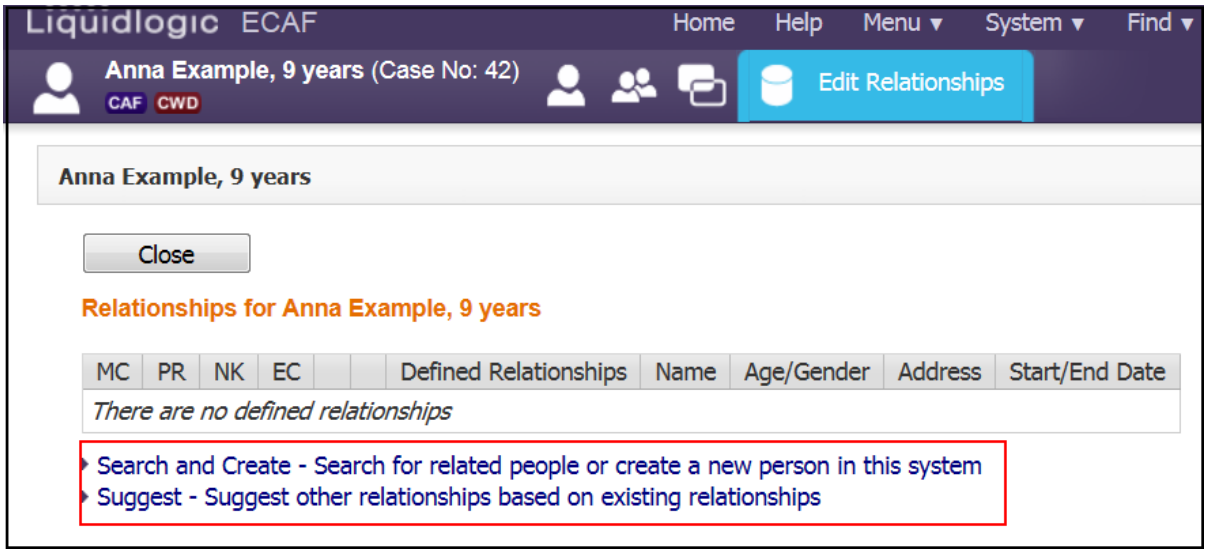
New Relationships

New Relationships – Search / Create Related Person

1. To create new relationships select **Edit Relationship** from the Relationships tab

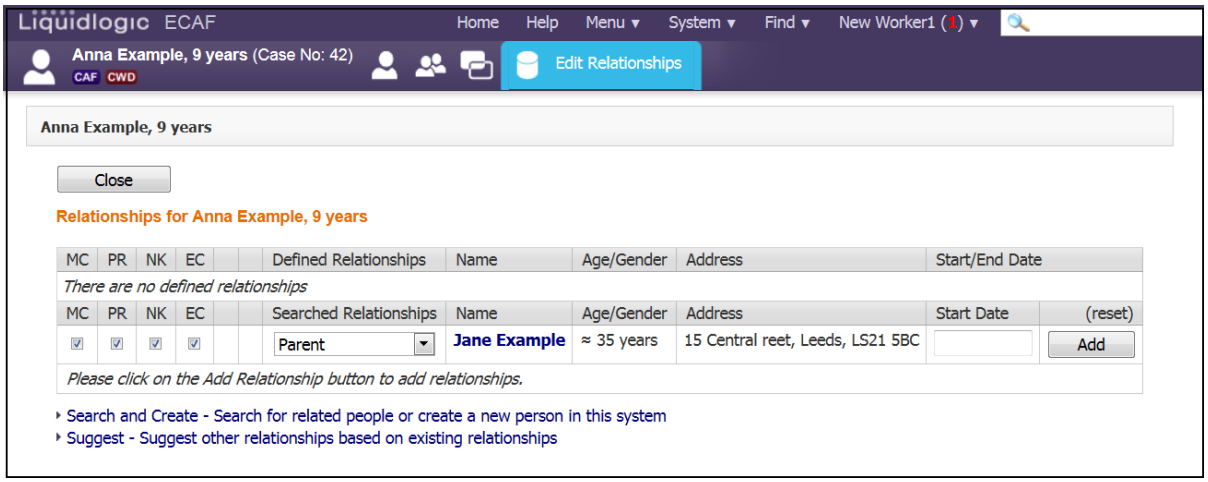
When creating/updating an individual's relationships there are 2 options:

- **Search and Create- Search for related people person or create a new person in this** system– Allows the user to search the system for any other family members, if not found the user can then create a new person record on the system
- **Suggest Relationships** – The suggest option will look at all of the relatives that have been set up against the selected child and look at their respective relationships. Any possible relationships will then be suggested for this child
-


Liquidlogic ECAF
Home
Help
Menu
System
Find
Anna Example, 9 years (Case No: 42)
CAF CWD
Edit Relationships
Anna Example, 9 years
Close
Relationships for Anna Example, 9 years
MC PR NK EC Defined Relationships Name Age/Gender Address Start/End Date
There are no defined relationships
Search and Create - Search for related people or create a new person in this system
Suggest - Suggest other relationships based on existing relationships

2. Choose the relevant **Relationship** type from the drop down selection
3. Click **Search / Create Related Person** and select the required individual (See the General User Manual for further details on Searching)

The individual chosen will populate the **Related Person** field



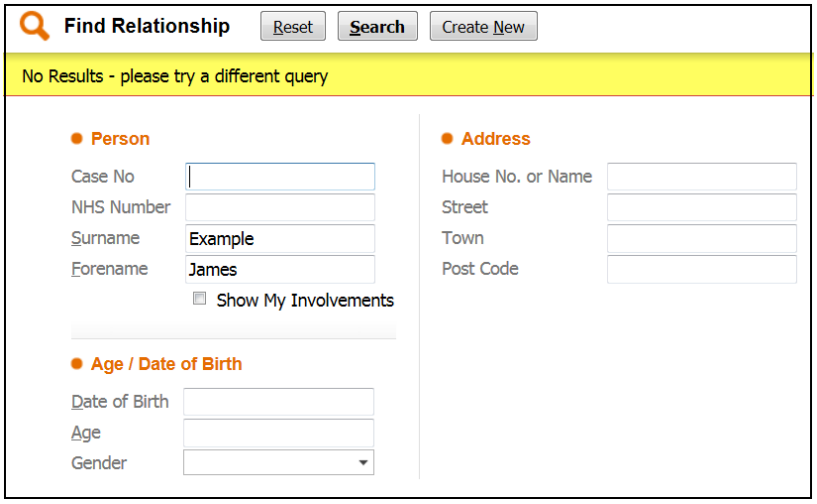
4. Click **Add** to add this person to the child's relationship tab on the demographics
5. Click Save and Close to return to demographic . The new relationship will now be shown on the record

New Relationships – Create Related Person

If a search has been conducted and no results have been found, you can create a new person on the system.

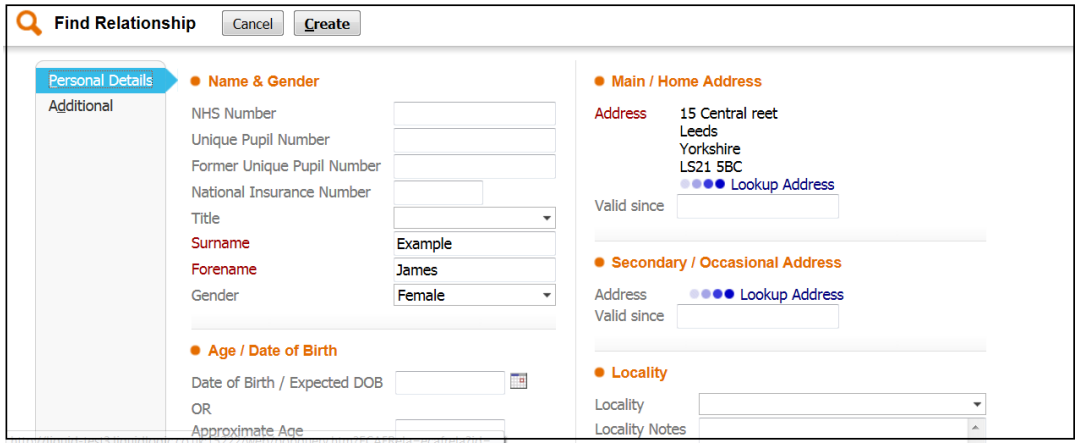
1. To create new relationships select **New Relationship** from the Relationships tab

2. Choose the relevant **relationship** type from the drop down selection
3. Click **Search / Create Related Person**
4. Use the Query tab to Search for required individual (See the General Manual for further details on Searching)
5. If no results are returned, change your search criteria and search again

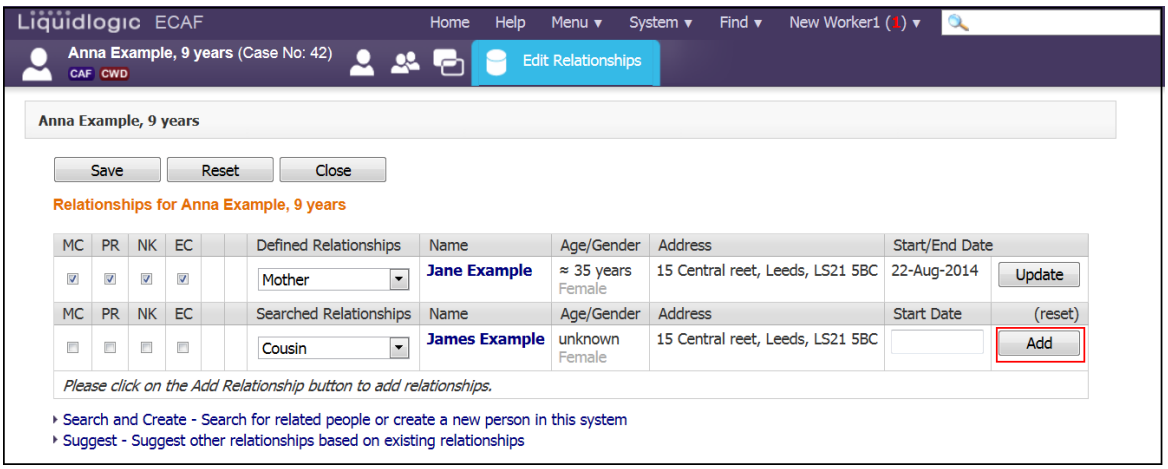


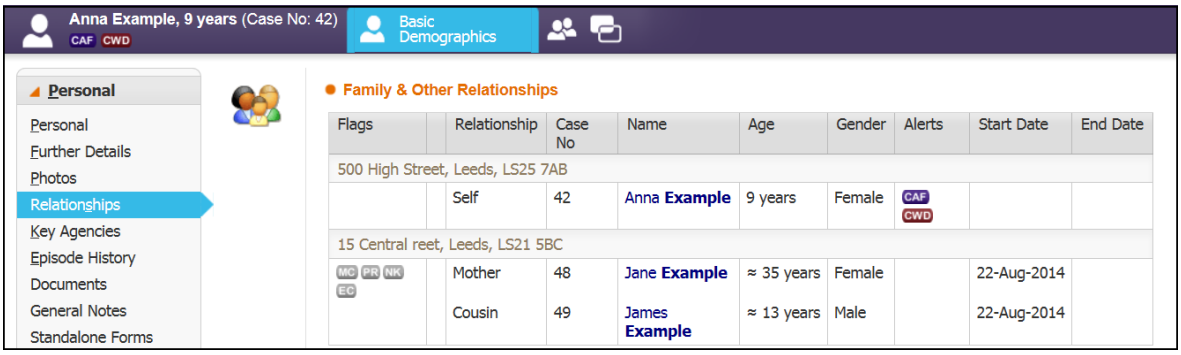
Please Note: Ensure you have exhausted all possible search options based on the information known on the individual before creating a new person record on the system.

6. Click **Creat New**
7. Enter the **Surname, Forename, Gender, Date of Birth** or **Approximate** Date Of Birth and any other information known e.g. Ethnicity, Religion, Disability etc
8. Click **Create** (See the **General** Manual for further guidance on creating person records.)

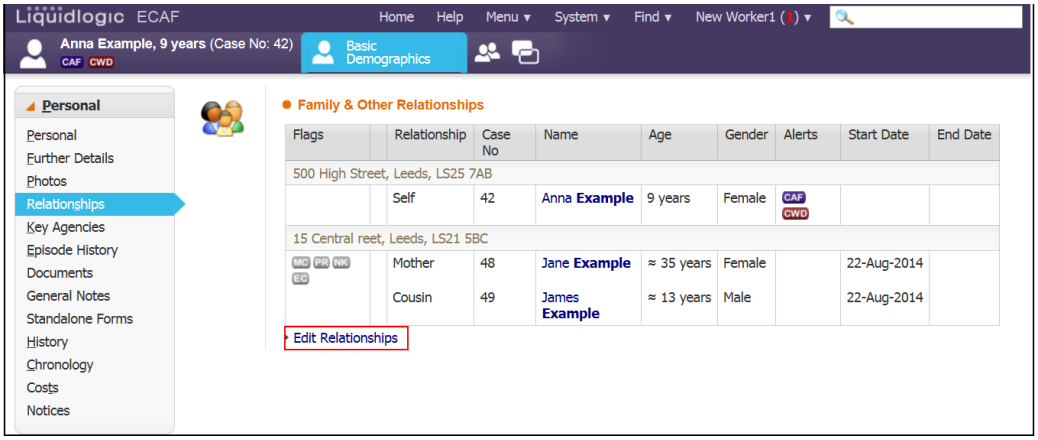


9. Click **Add** to add this person to the child's relationship tab

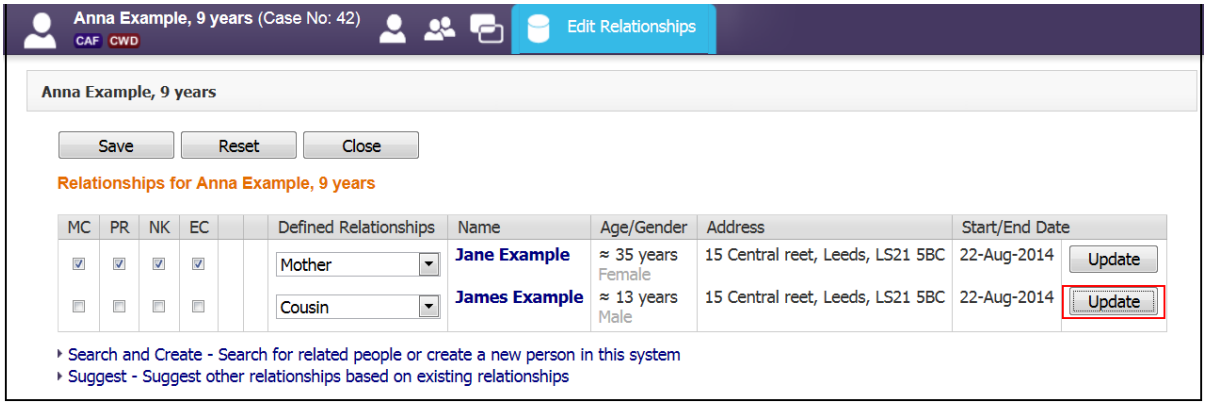




1. From the relationships tab, click **Edit Relationship**



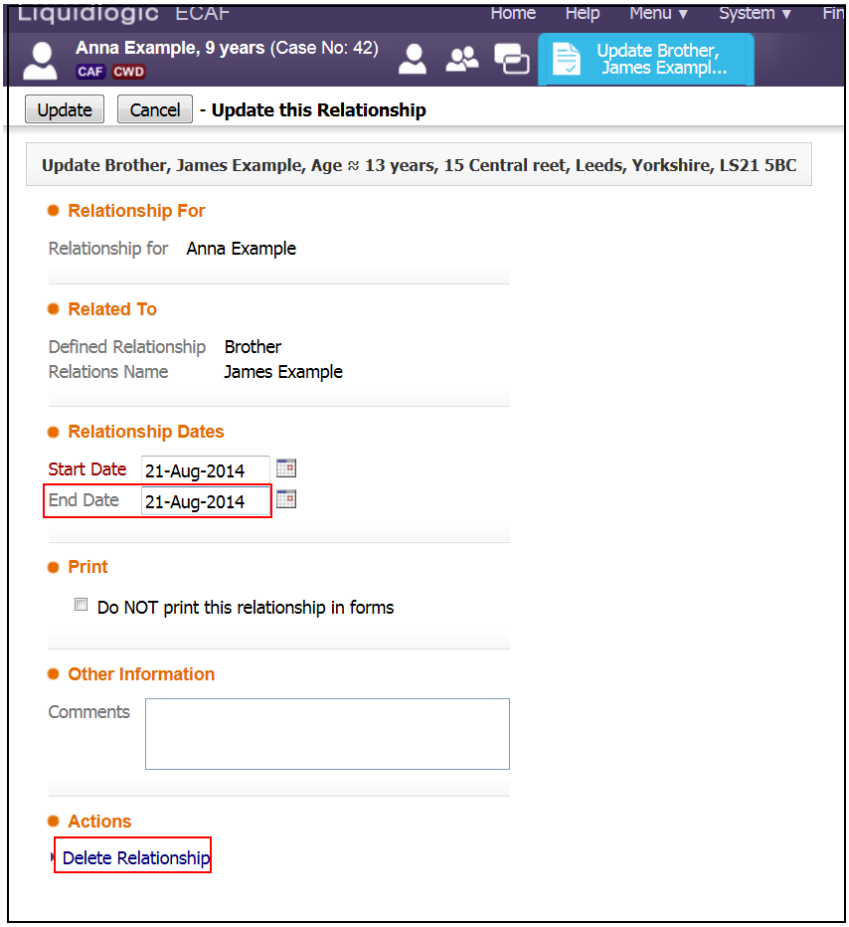
2. List of relationships will the displayed



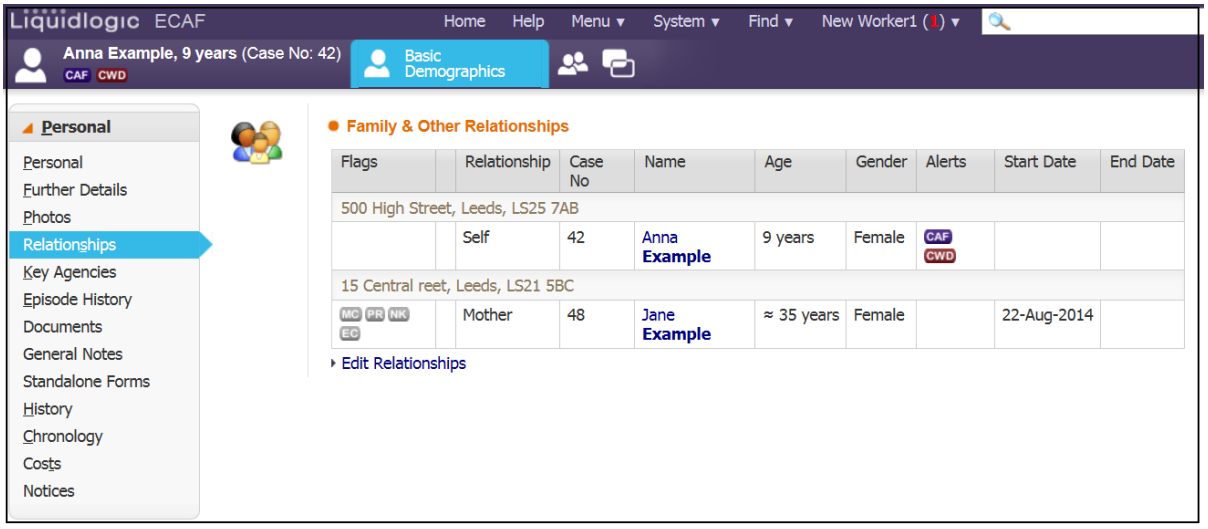
3. Click **Update** next the relationship to be updated
4. Make the required changes, and then click **Update**
5. To return to the relationships tab on the demographics click on the **Demographics icon**.

Deleting/End Relationships

1. From the Relationships tab, click on the Edit Relationship
2. Click **Update** of the relevant relationship
3. Enter the **End Date** and **comment** and then click Update to end the relationship
4. **Click Delete Relation to remove entirely**
5. To return to the relationships tab on the demographics click on the **Demographics icon**.

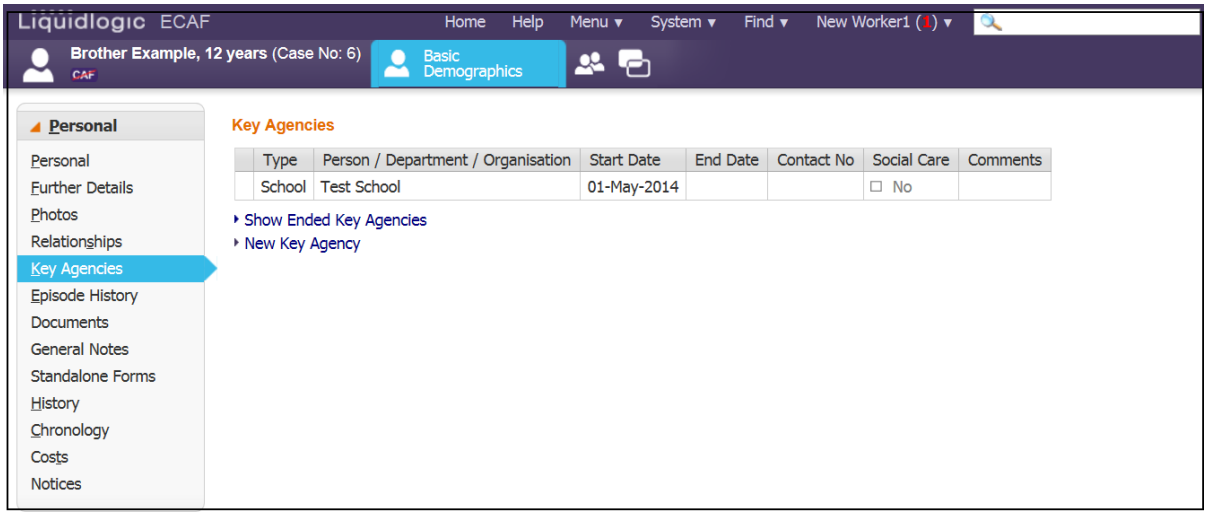


Deleted Relationships will be deleted from the Relationships tab, and will no longer be displayed on Relationship tab



Key Agencies

The **Key Agencies** tab holds information about any **Key Agencies** that are involved with the child.



Adding a New Key Agency

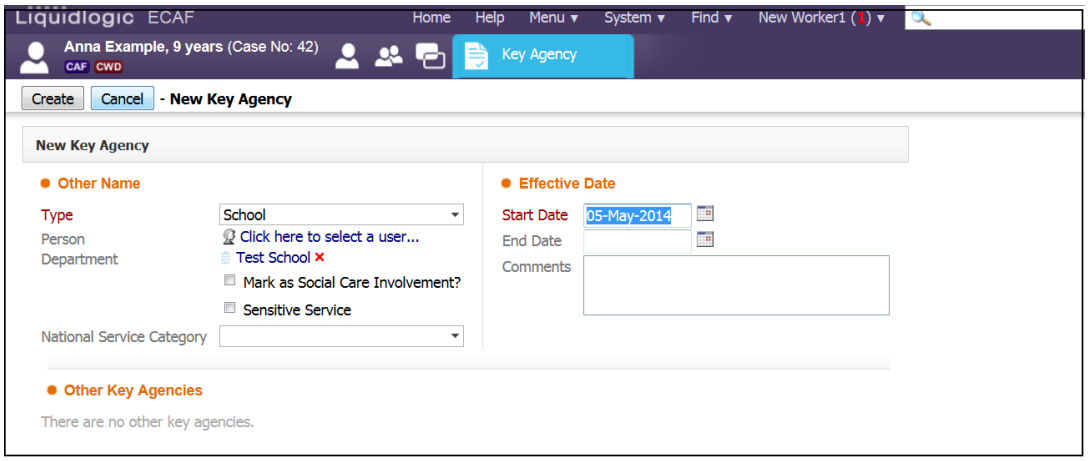
1. From the Key Agencies tab, select **New Key Agency**

2. Choose the Key Agency **Type** from the drop down selection
3. Select the appropriate **Click here to select a user link** against either the **Person** or **Department** field

Field	Description
Person	To search for a particular person linked to a key agency e.g. Dr Ian Jones
Department	To search for a named department/organisation which is considered as a key agency e.g. Willow Surgery

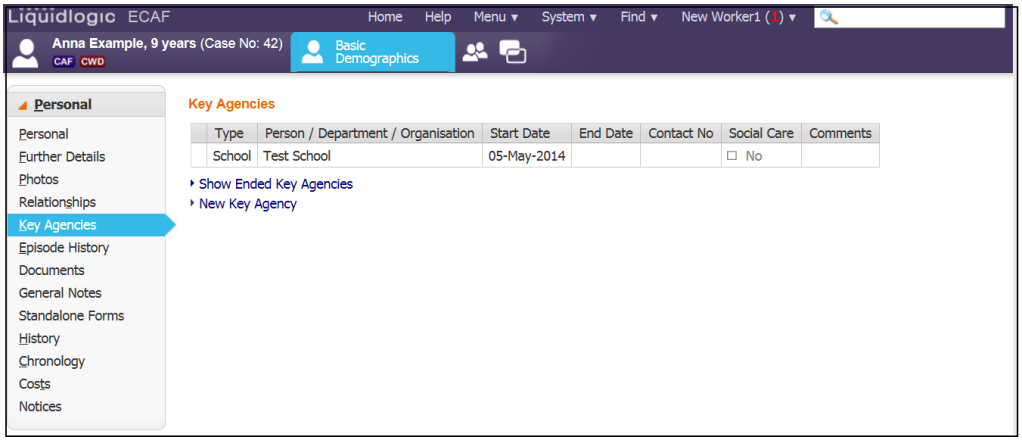
4. This will take you through to **My Contacts** where you can search for and select the key agency/person from the Address Book

For more information on using **My Contacts** and the **Address Book** please refer to the **General** Manual.



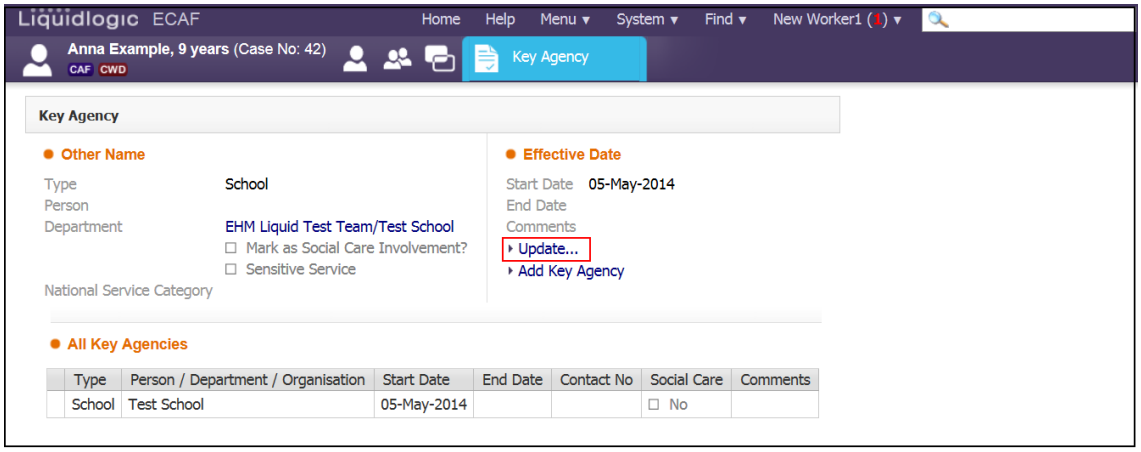
5. Enter the Effective **From** date and any other relevant comments for the Key Agency
6. Click **Create**

Added Key Agencies will now be displayed in the Key Agencies tab in the child's demographics:

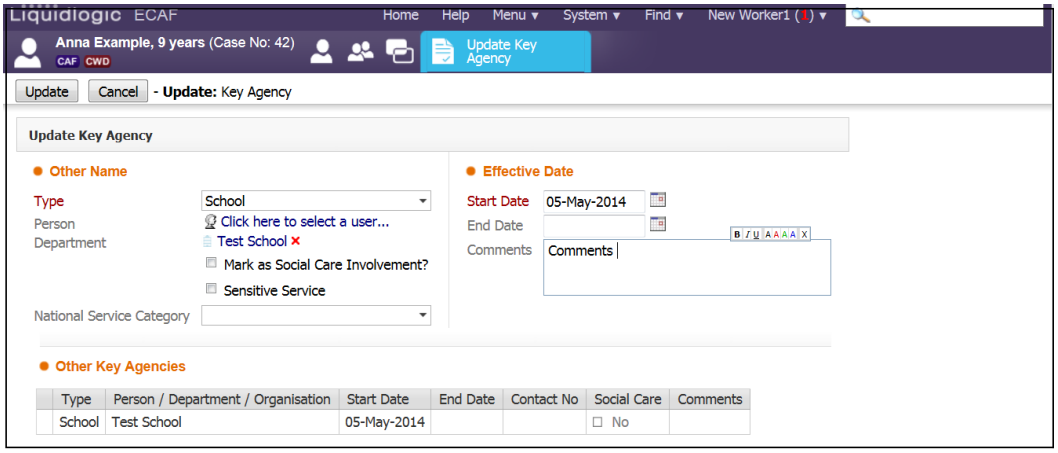

Liquidlogic ECAF
Home
Help
Menu
System
Find
New Worker1 (1)
Anna Example, 9 years (Case No: 42)
CAF CWD
Basic Demographics
Personal
Personal
Further Details
Photos
Relationships
Key Agencies
Episode History
Documents
General Notes
Standalone Forms
History
Chronology
Costs
Notices
Key Agencies
Type
Person / Department / Organisation
Start Date
End Date
Contact No
Social Care
Comments
School
Test School
05-May-2014
No
Show Ended Key Agencies
New Key Agency

Updating a Key Agency

1. From the Key Agencies tab, click on the required key agency
2. Click **Update…** to make the necessary changes

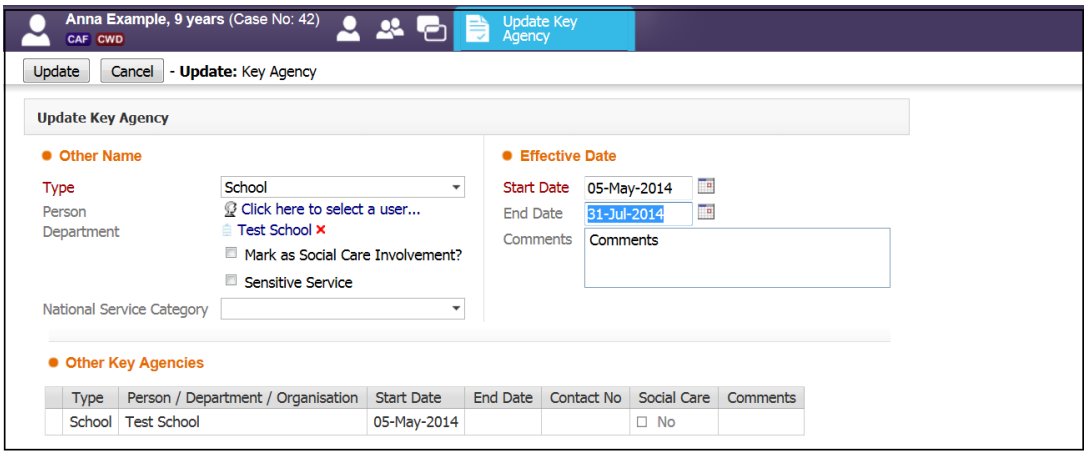

Liquidlogic ECAF
Home Help Menu System Find New Worker1 (1)
Anna Example, 9 years (Case No: 42)
CAF CWD
Key Agency
Key Agency
Other Name
Type School
Person
Department EHM Liquid Test Team/Test School
Mark as Social Care Involvement?
Sensitive Service
National Service Category
Effective Date
Start Date 05-May-2014
End Date
Comments
Update...
Add Key Agency
All Key Agencies
Type | Person / Department / Organisation | Start Date | End Date | Contact No | Social Care | Comments
School | Test School | 05-May-2014 | | | No |

3. Make the necessary changes, and then click **Update**


Liquidlogic ECAF
Home Help Menu System Find New Worker1 (1)
Anna Example, 9 years (Case No: 42)
CAF CWD
Update Key Agency
Update Cancel - Update: Key Agency
Update Key Agency
Other Name
Type School
Person Click here to select a user...
Department Test School
Mark as Social Care Involvement?
Sensitive Service
National Service Category
Effective Date
Start Date 05-May-2014
End Date
Comments Comments
Other Key Agencies
Type | Person / Department / Organisation | Start Date | End Date | Contact No | Social Care | Comments
School | Test School | 05-May-2014 | | | No |

Deleting a Key Agency

1. Select the Key Agencies tab, click on the necessary key agency to end and automatically delete
2. Click **Update**



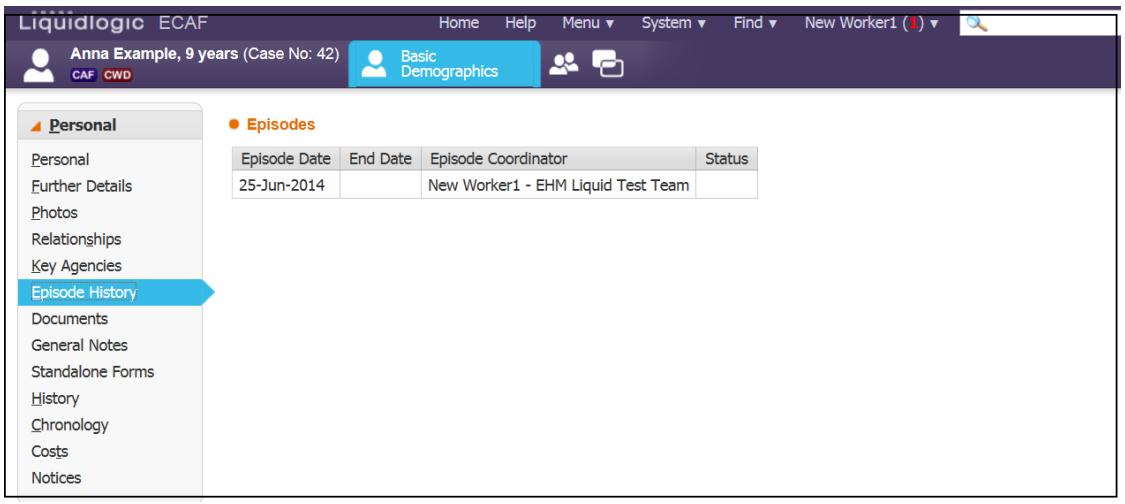
3. Enter Effective **To** date
4. Click **Update**
5. Click the Demographics Icon to return to demographics record

The Key Agency will be deleted from the Key Agencies tab

Episode History

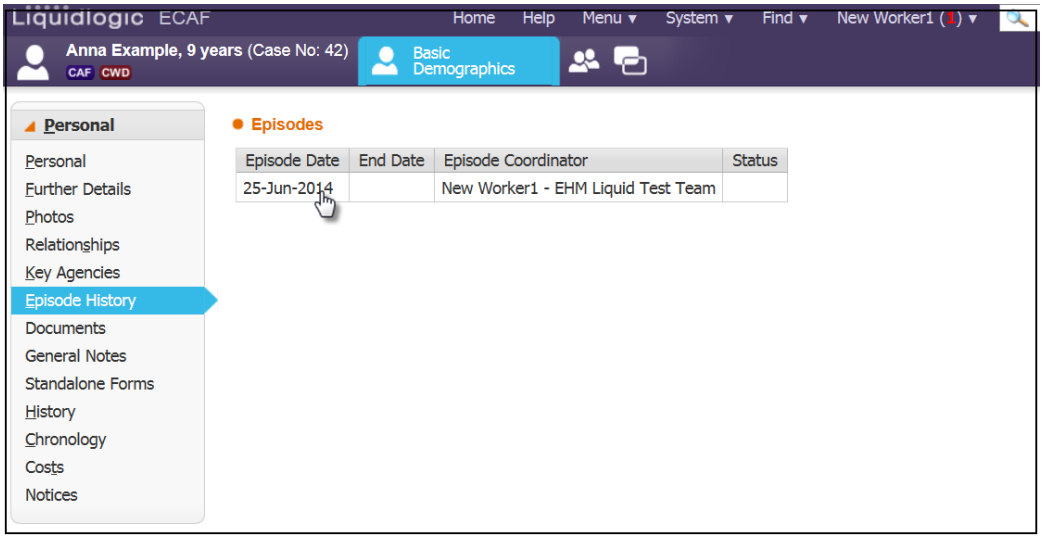
The **Episode History** tab is automatically updated as individuals; groups or departments record episodes for the child/young person.

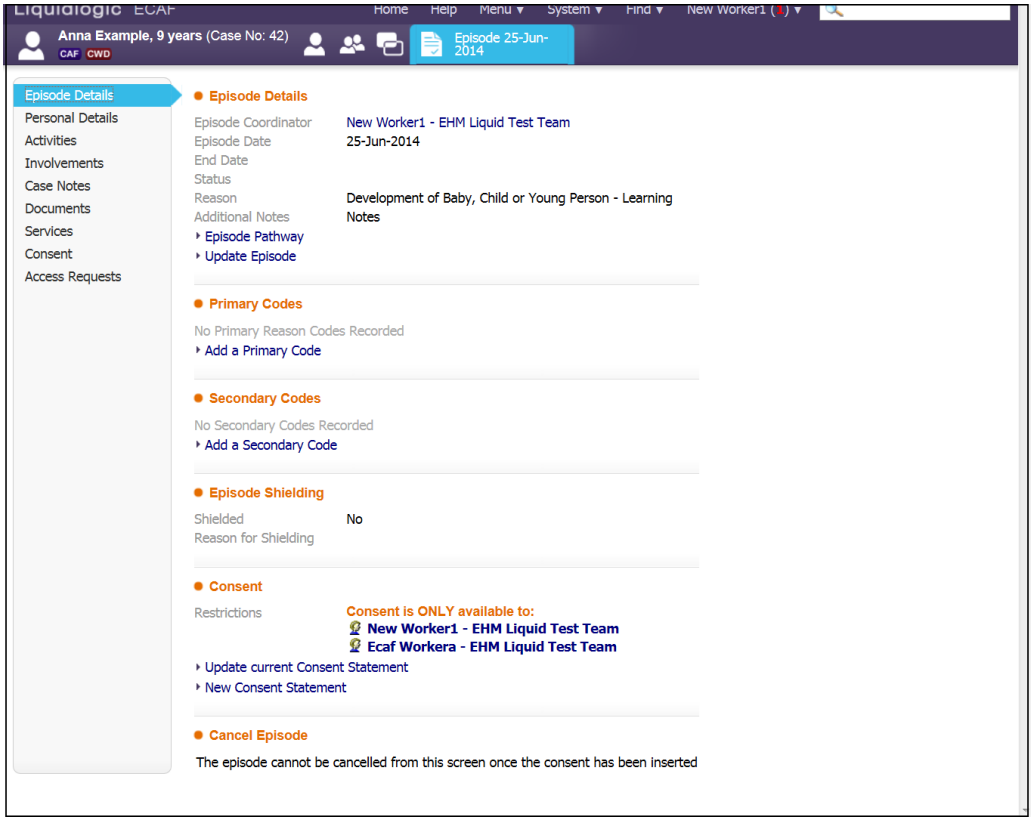
Important: If no previous and current episodes exist; and no electronic documents exist on the person record the Episode History tab will not be present on the demographics record.



Accessing the Episode Details

1. From the Episode History tab, select the episode to view the **Episode Details** tabs





NOTE: Please refer to the **Episode Details** manual for further information on these tabs.